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City of Whitehorse Downtown Retail Strategy Final Report

October 2006
2501-032-01-01

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City of Whitehorse

Downtown Retail Strategy

Final Report

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2501-032-01-01

December 2006

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1.0 Introduction

A Downtown Retail Strategy was commissioned by the City of Whitehorse in October, 2005 with funding provided by the Yukon Government's Regional Economic Development Fund. The primary objectives of this study, which is closely integrated with, and supportive of, Downtown Plan principles and priorities, are as follows:

- Assess, on a quantitative and qualitative basis, the existing retail-commercial infrastructure by undertaking a Downtown-wide inventory assessment.
- Survey Downtown retailers and service providers in order to get a better sense of Downtown Whitehorse's strengths and weaknesses from a business perspective.
- Survey Whitehorse residents on issues not directly covered in previous Downtown Plan surveys, namely: shopping patterns, identification of merchandising gaps, and parking-related ideas.
- Identify merchandising gaps – what's missing in terms of retail goods and services.
- Explore the concept of a retail hierarchy for Downtown Whitehorse – enhancing the existing pattern of retail uses, from local neighbourhood/convenience oriented uses such as traditional supermarkets to larger scale regional-serving uses such as big boxes Real Canadian Superstore and Wal-Mart through clustering of complementary establishments.
- Present ideas for better marketing Downtown Whitehorse to a variety of target groups, including prospective residents, tourists and visitors, prospective real estate investors, prospective business operators, and prospective employees.
- Forecast market demand for a range of retail categories in terms of both sales volume and warranted building floor area, based on realistic population and expenditure data.
- Present retail market planning principles and relevant lessons derived from experiences elsewhere.
- Present preliminary development ideas and concepts for high potential redevelopment sites in Downtown Whitehorse, as well as outline means of generating more private sector development interest.

As with any retail market study, the findings and recommendations in this study have arisen from analysis based on a set of key assumptions regarding trade area population growth, tourism activity, and spending patterns. If any significant economic shifts should take place within the next 5 to 10 years which cause significant changes in these market factors, these market findings should be carefully revisited.

2.0 Retail Inventory

An inventory of commercial retail, service, and office floor area was conducted for Downtown Whitehorse in November and December of 2005. Inventory information is based on field reviews, which included category by category unit counts and estimates of building floor area. Wherever access to exact information was readily available (i.e. floor area of large scale retailers), this data was used in place of the field survey estimates.

Such an inventory is crucial in order to:

- Provide quantitative estimates of existing retail-commercial floor area in order to facilitate subsequent forecasting of future retail-commercial floor area requirements.
- Review existing merchant/business representation on a category by category basis.
- Assess merchandising gaps in the existing retail market (What retail and related categories are currently under-represented? What potential additions to the existing mix would help to develop important retail clusters which provide critical mass and thus improved drawing power for all involved businesses?).
- Assess the status (extent, quality) of existing retail and service representation within each of the 6 Downtown sub-areas defined as part of the Downtown Plan process.

2.1 Downtown Commercial Floor Area

In order to tie in most effectively with Downtown Planning efforts and reflect the area's diversity (of character, built form, land use mix), this inventory was developed on a sub-area by sub-area basis, with results as shown in Figure 1. An overall summary of Downtown retail-commercial building inventory is presented below:

Table 2.1: Summary of Downtown Retail-Commercial Buildings

Commercial Use	Total Sq.ft.	Total Sq. M.	% Total
Retail (incl. retail food)	632,000	58,600	41%
Service (incl. restaurants)	792,000	72,700	51%
Office (commercial)	134,000	12,400	9%
Total	**1,558,000**	**16,700**	**100%**

These commercial use categories comprise the following:

- Retail: retail stores covering all retail categories, including retail food outlets (supermarkets) and automotive retail.
- Service: commercial service establishments, including hotels, restaurants and taverns, whose primary business is to provide a service rather than retail goods, to its customers.
- Office: non-government commercial office users.

Generally speaking, retail and service space tends to be either fairly balanced, or weighted slightly on the retail side. In Whitehorse, however, the importance of tourism to the local economy is evident in the number of hotels and motels, some of which are operated seasonally. These commercial service establishments comprise a significant proportion of identified service commercial floor area. Over time, as retail market or merchandising gaps continue to fill in, the retail proportion of this commercial floor area total should increase.

DOWNTOWN WHITEHORSE (OVERALL)
Commercial Use | Total Sq. Ft. | Total Sq. M. | % Total
Retail (including retail food) | 632,000 | 58,700 | 41%
Service (including hotels, restaurants) | 792,000 | 73,600 | 51%
Office (commercial, non-government) | 134,000 | 12,400 | 8%
Total | 1,558,000 | 144,700
DOWNTOWN NORTH
Commercial Use | Total Sq. Ft. | Total Sq. M. | % Total
Retail (including retail food) | 240,000 | 22,300 | 54%
Service (including hotels, restaurants) | 170,000 | 15,800 | 38%
Office (commercial, non-government) | 35,000 | 3,300 | 8%
Total | 445,000 | 41,400
OLD TOWN
Commercial Use | Total Sq. Ft. | Total Sq. M. | % Total
Retail (including retail food) | 5,000 | 500 | 12%
Service (including hotels, restaurants) | 31,000 | 2,900 | 72%
Office (commercial, non-government) | 7,000 | 700 | 16%
Total | 43,000 | 4,100
DOWNTOWN SOUTH
Commercial Use | Total Sq. Ft. | Total Sq. M. | % Total
Retail (including retail food) | 8,000 | 700 | 5%
Service (including hotels, restaurants) | 105,000 | 9,800 | 70%
Office (commercial, non-government) | 37,000 | 3,400 | 25%
Total | 150,000 | 13,900
NORTH END SERVICE COMMERCIAL
Commercial Use | Total Sq. Ft. | Total Sq. M. | % Total
Retail (including retail food) | 267,000 | 24,800 | 60%
Service (including hotels, restaurants) | 179,000 | 16,600 | 40%
Office (commercial, non-government) | 2,000 | 200 | 0%
Total | 448,000 | 41,600
DOWNTOWN RIVERFRONT
Commercial Use | Total Sq. Ft. | Total Sq. M. | % Total
Retail (including retail food) | 14,000 | 1,300 | 19%
Service (including hotels, restaurants) | 43,000 | 4,000 | 60%
Office (commercial, non-government) | 15,000 | 1,400 | 21%
Total | 72,000 | 6,700
DOWNTOWN COMMERCIAL CORE
Commercial Use | Total Sq. Ft. | Total Sq. M. | % Total
Retail (including retail food) | 98,000 | 9,100 | 25%
Service (including hotels, restaurants) | 264,000 | 24,500 | 66%
Office (commercial, non-government) | 38,000 | 3,500 | 9%
Total | 400,000 | 37,100
OLD TOWN
NORTH END SERVICE COMMERCIAL
DOWNTOWN NORTH
DOWNTOWN COMMERCIAL CORE
RIVERFRONT
DOWNTOWN SOUTH

City of Whitehorse Downtown Retail Strategy

Downtown Whitehorse Retail Commercial Inventory Summary

2.2 Downtown Merchandising Gaps

Based on the Downtown Plan public and stakeholder consultation, the results of both the Retailer & Service Provider and Consumer Retail surveys, and the Downtown inventory assessment, the following have been identified as being under-represented (not necessarily unrepresented) in Downtown Whitehorse. The following uses, if added to the retail mix over time, are likely to yield positive results in terms of overall market appeal, Whitehorse resident quality of life, tourist and visitor satisfaction, and social and economic vibrancy.

One important consideration when assessing merchandising gaps in a given retail market is the balance between independently owned and operated and chain or franchise establishments. Independents, which are most often run by local or regional residents, are important as they tend to add to a community's character and diversity, providing either a unique range of products or services, or a unique take on a "tried and true" approach. Independent operators tend to know and understand local residents, provide a more personalized level of service and can respond very quickly to shifting market preferences. Possible pitfalls for a market too heavily weighted with independent operations include: variability in quality of products or services, limited ability to pay higher rents, lower recognition for tourists and visitors, and limited longevity.

Advantages of chain stores in a given retail market typically include: established standards of quality regarding products and services, full recognition from tourists and visitors, ability to pay higher rents, ability to anchor a project by providing necessary drawing power, and reliability/longevity. If a given Downtown retail market is too dominated by chain stores, however, it tends to have an "anywhere North America" effect, as it is difficult for the community's character to shine through a sea of neon "sameness". A properly balanced market, however, offers the benefits of both independents and chains, while mitigating the potential disadvantages.

Restaurants

- Ethnic restaurants including East Indian, French, Greek, Japanese, Thai (affordable and/or fine dining)
- High quality steak/rib house (independent or chain restaurant)
- Microbrewery/high quality pub
- Mid-priced chain restaurants (Moxie's, Kelsey's, Earl's, The Keg)
- Bistros, cabarets, restaurants with live music
- Ice cream/gelato shop (Summer)
- Cafes, restaurants, pubs on the waterfront

Clothing, Shoes, and Accessories

- Second hand/vintage clothing stores
- Children's clothing boutique
- Fashion outlet stores
- Unique/hand-made jewellery
- Affordable sporting clothing/sporting goods (e.g. Sport Mart)

General Merchandise/Department Store

- London Drugs (pharmacy, computers, cameras, pre-recorded media (DVDs, CDs and games), household appliances, housewares)
- Zellers (not deep enough market to support both Wal-Mart and Zellers in the short term, but may be a possibility over the long term)
- High quality dollar store concept, with affordable household gadgets and kitchenware

Household Furnishings

- Kitchen / gourmet cooking shop
- World/imported furnishings shop
- Custom/hand-made/unique woodworking/furniture shop
- Custom/hand-made/unique home furnishings shops (particularly smaller-scale independents)

Retail Food

- Health food/natural food store (smaller model chain store such as Capers or Choices, or preferably a smaller independent establishment)
- Fresh food market outlets/categories (fruit, vegetables, baked goods, meat and fish, pastries)
- Imported specialty foods store
- Independent wine shop

Culture and Entertainment

- True art gallery showcasing northern art, First Nations art
- Better quality theatres, cinemas to replace existing older 2-screen theatres
- Quality billiards hall
- Theatre for performing arts
- Better quality/independent video/DVD rental outlet

Specialty Retail

- Specialized, unique, or handcrafted musical instruments
- Watches and time pieces
- Craft supplies (smaller independent operator or smaller model chain store) – sewing, beads, fabrics, paper, etc.
- Custom bikes and skateboards
- Used bookstores specializing in one or more categories (e.g. art/architecture/design/photography, biography/history/philosophy/religion/sociology)

2.2.1 Non-Retail and Service Sector Market Gaps

The following uses and services are lacking or under-represented in Downtown Whitehorse. Addition of these uses and services over time will allow Downtown Whitehorse to better meet the planning objectives outlined in the Downtown Plan:

- Quality bed and breakfast houses, retreat houses
- Small boutique-style hotel or lodge
- Downtown public transit service/loop/shuttle
- New multi-family residences (including those for seniors) near Downtown Commercial Core and Downtown Riverfront
- Mixed use development (two to three storeys of residential uses over commercial retail and services at grade)
- Dedicated RV parking area with appropriate on-site services

2.3 Inventory Assessments

More detailed Downtown retail-commercial inventory results and assessments are provided on the following pages for each of the six defined Downtown sub-areas.

These summaries include the floor area estimates outlined in section 2.1 as well as unit counts in various retail and related categories. These unit counts yield category proportions for each sub-area which help to draw a clearer picture of each sub-area's differing character and role in the Downtown Whitehorse retail market.

Based on public and stakeholder consultation and observations taken from Whitehorse field work and lessons and ideas that have worked elsewhere, new category unit representation targets can be set. Although these need to be flexible, in order to account for real world market dynamics, establishing rough targets based on sound principles will provide some desirable direction for further development of retail and service space in Downtown Whitehorse.

2.4 Old Town

Figure 2.2: Old Town Sub-Area

Commercial Floor Area

Commercial Use	Floor Area ('000)		
	Sq.ft.	Sq. M.	% Total
Retail	5,000	500	12%
Service	31,000	2,900	72%
Office	7,000	700	16%
Total	**43,000**	**4,100**	**100%**

- New/renovated/v.good space: 20%
- Good/adequate space: 50%
- Space in need of renovation: 30%

Commercial Retail Unit Representation

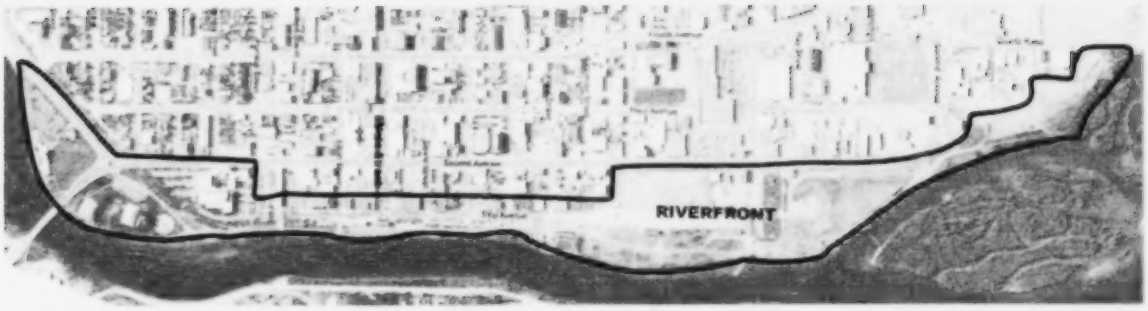
Category	# Units	% Total
Services	11	37%
Specialty Retail	3	10%
Clothing & Accessories	0	0%
Retail Food/Rest.	1	3%
Drug Store/Pharmacy	0	0%
HH Furniture/Furnishings	0	0%
Automotive/Parts Sales	0	0%
Govt./Heritage/Institut/Commun.	10	33%
Professional/Busir ess Office	5	17%
Vacant	0	0%
Total	**30**	**100%**

Major Observations for Old Town

- Mainly low density residential with some limited commercial activity, including home-based businesses.
- Main commercial activity is along 5th and 6th Avenues – a Riverside-type corner grocery would work well.
- Future commercial uses between 5th and 6th should be mainly of a neighbourhood/convenience orientation as this will best meet the needs of nearby Downtown residents – the Alpine Bakery is a popular local meeting place and eatery, in essence acting as a commercial social anchor.
- High service space proportion is appropriate for neighbourhood oriented commercial nodes.

2.5 Downtown Riverfront

Figure 2.3: Riverfront Sub-Area



Commercial Floor Area

Commercial Use	Floor Area ('000)		
	Sq.ft.	Sq. M.	% Total
Retail	14,000	1,300	19%
Service	43,000	4,000	60%
Office	15,000	1,400	21%
Total	**72,000**	**6,700**	**100%**

- New/renovated/v.good space: 10%
- Good/adequate space: 85%
- Space in need of renovation: 5%

Commercial Retail Unit Representation

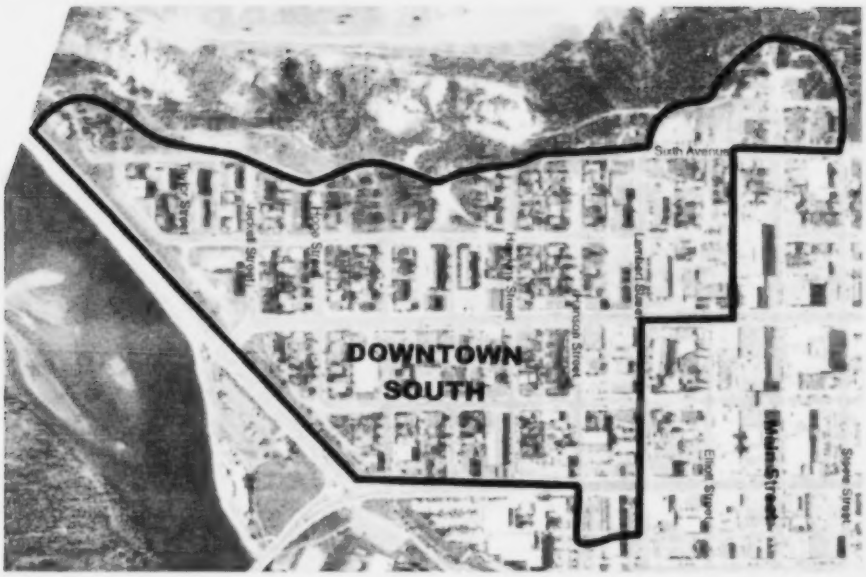
Category	# Units	% Total
Services	8	15%
Specialty Retail	6	11%
Clothing & Accessories	2	4%
Retail Food/Rest.	6	11%
Drug Store/Pharmacy	0	0%
HH Furniture/Furnishings	0	0%
Automotive/Parts Sales	0	0%
Govt./Heritage/Institut/Commun.	9	17%
Professional/Business Office	19	35%
Vacant	4	7%
Total	**54**	**100%**

Major Observations for Downtown Riverfront

- The majority of commercial space is at the south end of the riverfront.
- Planned 10,000 sq.ft. of retail-commercial and service (likely food and beverage) space in the proposed Arts & Heritage Village would work best if very fine-grain – many small-scale, independently owned and operated facilities that cater to both residents and tourists/visitors.
- Downtown Riverfront vibrancy would be significantly enhanced through the addition of a variety of food and beverage service establishments, including full-service restaurants with outdoor and/or covered patios, cafés and dessert houses, and vendors selling seasonal snacks and beverages (e.g. ice cream in Summer, hot cocoa in Winter).
- First Avenue improvements now underway will significantly improve the aesthetics of this corridor and are likely to lead to more residential development interest.
- Both mixed-use and all-residential projects should be encouraged in this area, as this will provide both existing and future commercial establishments with a sufficiently strong market base and generate activity throughout the day and evening.

2.6 Downtown South

Figure 2.4: Downtown South Sub-Area



Commercial Floor Area

Commercial Use	Floor Area ('000)		
	Sq.ft.	Sq. M.	% Total
Retail	8,000	700	5%
Service	105,000	9,800	70%
Office	37,000	3,400	25%
Total	**150,000**	**13,900**	**100%**

- New/renovated/v.good space: 40%
- Good/adequate space: 55%
- Space in need of renovation: 5%

Commercial Retail Unit Representation

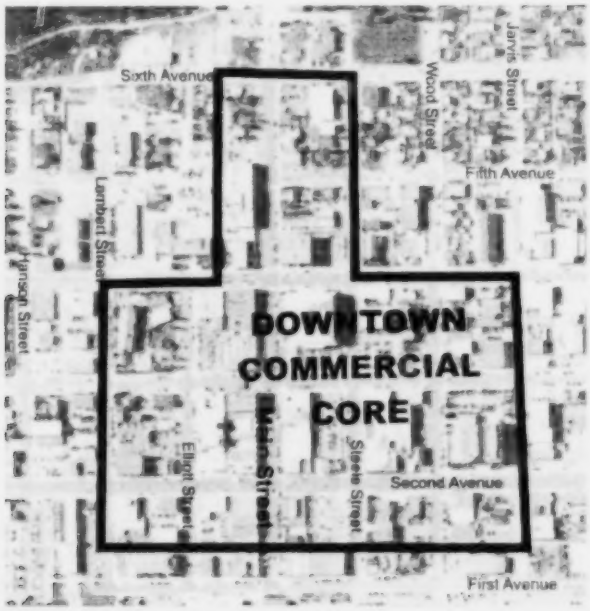
Category	# Units	% Total
Services	18	35%
Specialty Retail	1	2%
Clothing & Accessories	0	0%
Retail Food/Rest.	10	20%
Drug Store/Pharmacy	1	2%
HH Furniture/Furnishings	1	2%
Automotive/Parts Sales	0	0%
Govt./Heritage/Institut/Commun.	0	0%
Professionl/Business Office	19	37%
Vacant	1	2%
Total	**51**	**100%**

Major Observations for Downtown South

- Majority of commercial space is on or east of 4th Ave – High Country Inn and convention/meeting space.
- Mainly residential west of 4th Ave - medium density residential apartments, typically older buildings and simple styles – better quality residential offering access to the Riverfront and Main Street area are desirable.
- Riverside Grocery is deemed a vital neighbourhood-serving retail food outlet – an important retail anchor in spite of its small size (redevelopment concepts should consider retention).
- Some vacant parcels, significant bed and breakfast potential (well located relative to riverfront, Main St.).

2.7 Downtown Commercial Core

Figure 2.5: Downtown Commercial Core Sub-Area



Commercial Floor Area

Commercial Use	Floor Area ('000)		
	Sq.ft.	Sq. M.	% Total
Retail	98,000	9,100	25%
Service	264,000	24,500	66%
Office	38,000	3,500	9%
Total	**400,000**	**37,100**	**100%**

- New/renovated/v.good space: 40%
- Good/adequate space: 55%
- Space in need of renovation: 5%

Commercial Retail Unit Representation

Category	# Units	% Total
Services	85	36%
Specialty Retail	34	14%
Clothing & Accessories	9	4%
Retail Food/Rest.	34	14%
Drug Store/Pharmacy	2	1%
HH Furniture/Furnishings	2	1%
Automotive/Parts Sales	2	1%
Govt./Heritage/Institut/Commun.	63	26%
Professional/Business Office	0	0%
Vacant	7	3%
Total	**85**	**100%**

Major Observations for Downtown Commercial Core

- Currently functioning with a healthy level of vitality, particularly relative to downtown areas in other small and medium-sized cities.
- Government and institutional uses, as well as specifically tourist-oriented retail shops are somewhat over-represented, while specialty retail, clothing and accessories, and quality restaurants are under-represented.
- Popularity with tourists and visitors will actually tend to rise more with unique additions that cater mainly to local residents, rather than uses catering specifically to tourists. Main Street is primarily a community-serving retail and service node that has wide regional appeal.

2.8 Downtown North

Figure 2.6: Downtown North Sub-Area

Commercial Floor Area

Commercial Use	Floor Area ('000)		
	Sq.ft.	Sq. M.	% Total
Retail	240,000	22,300	54%
Service	170,000	15,800	38%
Office	35,000	3,300	8%
Total	**445,000**	**41,400**	**100%**

- New/renovated/v.good space: 20%
- Good/adequate space: 50%
- Space in need of renovation: 30%

Commercial Retail Unit Representation

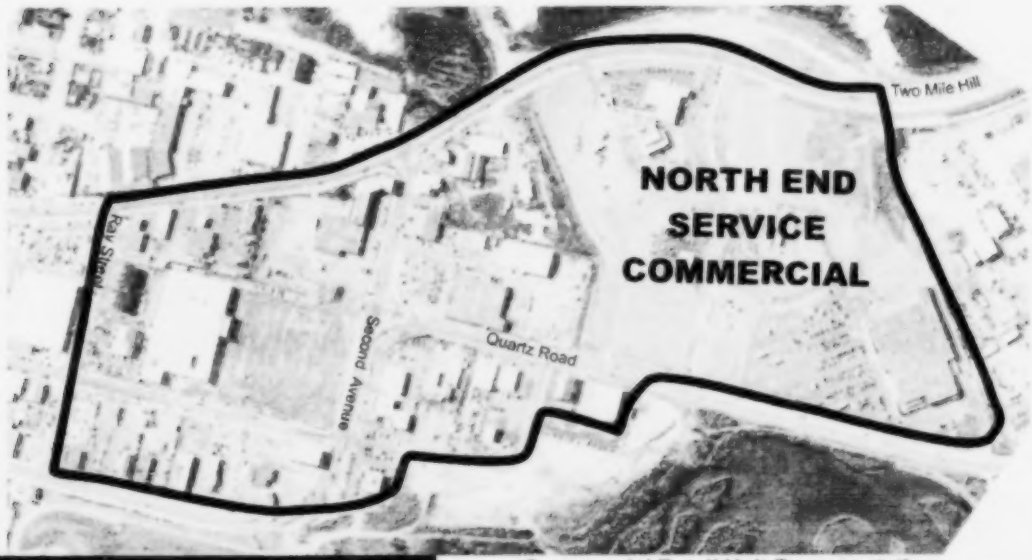
Category	# Units	% Total
Services	14	24%
Specialty Retail	12	20%
Clothing & Accessories	2	3%
Retail Food/Rest.	11	19%
Drug Store/Pharmacy	0	0%
HH Furniture/Furnishings	0	0%
Automotive/Parts Sales	7	12%
Govt./Heritage/Institut/Commun.	6	10%
Professional/Business Office	0	0%
General Retail/Department Store	3	5%
Vacant	4	7%
Total	**59**	**100%**

Major Observations for Downtown North

- Qwanlin Mall underperforming as a community shopping centre, prime target for redevelopment, preferably with a residential component (possibly for seniors); Yukon Centre Plaza to the east also a prime candidate.
- Many buildings in poor condition, limited aesthetic quality – some areas should be targeted for redevelopment (i.e. Jamieson block).
- More mixed use development would be welcome in this area, particularly centered on the desired 3rd Avenue pedestrian corridor. This would lead to a stronger link between the Downtown Core and Downtown North. Additional residential would also provide necessary "captive market" for expanded commercial land uses.

2.9 North End Service Commercial

Figure 2.7: North End Service Commercial Sub-Area



Commercial Floor Area

Commercial Use	Floor Area ('000)		
	Sq.ft.	Sq. M.	% Total
Retail	267,000	24,800	60%
Service	179,000	16,600	40%
Office	2,000	200	0%
Total	**448,000**	**41,600**	**100%**

- New/renovated/v.good space: 80%
- Good/adequate space: 20%
- Space in need of renovation: 0%

Commercial Retail Unit Representation

Category	# Units	% Total
Services	36	27%
Specialty Retail	25	19%
Clothing & Accessories	6	4%
Retail Food/Rest.	14	10%
Drug Store/Pharmacy	1	1%
HH Furniture/Furnishings	1	1%
Automotive/Parts Sales	8	6%
Govt./Heritage/Institut/Commun.	20	15%
Professional/Business Office	18	13%
Vacant	6	4%
Total	**135**	**100%**

Major Observations for North End Service Commercial

- Residential dwellings above Sports North/Cinderwood, Antique/Cash Loan Store
- Klondike Inn accounts for approx 75,000 sq ft of service space, yet is only operated seasonally.
- Some large parcels undeveloped (mainly within the Argus development)
- Understandable that Safeway passed on location given extent of supermarket space in Whitehorse
- North End may not be the optimal location for a new theatre complex, particularly since a large-scale box-format cinema model may not be fully supported in this market

2.10 Downtown Whitehorse as a Whole

Figure 2.8: All Downtown Whitehorse Sub-Areas

Commercial Floor Area

Commercial Use	Floor Area ('000)		
	Sq.ft.	Sq. M.	% Total
Retail	632,000	58,700	41%
Service	792,000	73,600	51%
Office	134,000	12,400	8%
Total	**1,558,000**	**144,700**	**100%**

Commercial Retail Unit Representation

Category	# Units	% Total
Services	172	30.3%
Specialty Retail	81	14.3%
Clothing & Accessories	19	3.4%
Retail Food/Rest.	76	13.4%
Drug Store/Pharmacy	4	0.7%
HH Furniture/Furnishings	4	0.7%
Automotive/Parts Sales	17	3.0%
Govt./Heritage/Institut/Commun.	108	19.0%
Professional/Business Office	61	10.8%
General Retail/Department Store	3	0.5%
Vacant	**22**	**3.9%**

2.11 Downtown Whitehorse Retail Strengths and Weaknesses

While Downtown Whitehorse may have some definable merchandising gaps (unrepresented or under-represented retail and service categories) and some clearly under-developed sites and clusters, it actually has a number of key advantages or strengths relative to many other Downtown areas in other small and medium cities throughout Western Canada. These include:

- Downtown is by far the dominant market area for the majority of consumer products and services, as well as the dominant employment area. Other than very localized services in the midst of residential communities such as Riverdale and Porter Creek (such as neighbourhood supermarkets and pharmacies), suburban residents must visit Downtown for the majority of their shopping and service-related needs. The fact that there are no significant community-wide or regional-serving commercial nodes outside of Downtown is a huge advantage for furthering Downtown development objectives.

- "Power mall" (shopping centre type dominated by big-box retail stores such as Wal-Mart) development is taking place at the north end of Downtown, rather than in a non-Downtown highway location. The importance and positive implications of this should not be underestimated. Many a downtown core, particularly for small to medium sized municipalities, has been irreparably damaged by lack of forethought in the planning and approval of such highway-oriented shopping centre development. Although by definition such development is dominated by chain stores, this is likely to be a tremendous benefit to Downtown Whitehorse over time as it provides a critical mass with significant regional drawing power, with spin-off benefits for other Downtown areas.

- Main Street is a vibrant street retail district popular with residents, tourists, and visitors alike. Although the Downtown Core Commercial area is generally under-developed, Main Street is a strong anchor and an excellent building block for future growth. Planned and desired development along the riverfront (and First Avenue) will likely enhance the importance and popularity of Main Street, particularly if the intersection of Main Street and First Avenue is further enhanced as a pedestrian gateway to the riverfront area.

- The extent of planning efforts and studies currently underway for Downtown Whitehorse is indicative of wide-spread support for building on current Downtown strengths in such a way that better serves current and future residents, tourists, and visitors. This momentum will be important in order to translate ideas into action and generate sufficient interest and investment from the private sector.

- Downtown Riverfront potential: Better use of the riverfront, for arts and cultural, recreational, and social as well as appropriately scaled commercial uses, will do wonders for the overall vibrancy of Downtown Whitehorse, but will also bolster the importance of Main Street as the commercial heart of the City.

- The extent, strength and organized thought of the local arts community are evidence that Whitehorse has the potential to become an even more important centre in the Canadian cultural landscape. With growth of arts and culture comes increased interest in Downtown living options and associated needs for goods and services. Although the design, scale, and even location of the proposed Arts and Heritage Village have yet to be finalized, the general concept is supported as a means of building on Whitehorse's unique cultural advantages.

- Tourism growth and potential – The north has long been a fascination for the rest of Canada and the world. Improved air travel routes will help to stimulate further interest from North American as well as overseas visitors (including Japan).

2.12 Downtown Riverfront Retail Potential – Concepts That Work

"The Lookout" – Horseshoe Bay, BC

"The Boathouse Restaurant" – Horseshoe Bay, BC

"Steveston Village" - Richmond, BC

"Steveston Village" - Richmond, BC

"Steveston Village" - Richmond, BC

3.0 Retailer & Service Provider Survey

3.1 Introduction

The Retailer and Service Provider survey, with the help of City staff, was sent out to business owners and operators in Downtown Whitehorse in mid November, 2005. Typically, the response rate for such surveys is fairly low – on the order of 10% to 15% - so the total number of complete survey responses here (20) is not altogether unexpected. This nevertheless represents a significant enough sample, given the relatively small municipal context, from which to draw some important retail market and related conclusions.

The original survey and letter to the retailers from the City may be found in Appendix A.

3.2 Survey Results

Results have been summarized question by question. Please note that questions 1 and 2 on the survey dealt with business-specific and contact-specific information and were used entirely for internal purposes, including follow-up discussions for clarification of identified issues and concerns. For greater clarity, the subject of each survey question, rather than the question itself, is listed below along with the results and interpretation.

3.2.1 Q3. Primary Category of Products or Services

Although limited in number, respondent retailers and service providers covered a broad spectrum of commercial categories, as noted below:

- Tourist souvenirs, gifts, jewellery (4 responses)
- Art gallery, gifts, picture framing shop (3 responses)
- Specialty clothing, shoes, accessories (2 responses)
- Sporting goods
- Non government organization (NGO) - environmental services
- Hotel, restaurant, and camping equipment supplies
- Office supplies
- Health care supplies
- Arts and crafts, knitting supplies
- Drug store/pharmacy
- Books, maps, magazines
- Electrical sales and maintenance
- Retail food, groceries
- Hotel, tourist accommodations
- Restaurant

Although a relatively small sample size, the categories represented by the respondent group reflect the importance of tourism and related spending to the local economy and to Downtown Whitehorse business activity. It is also very positive that a wide range of retail-commercial categories are represented, so that no one sector is over-represented.

3.2.2 Q4. Type of Establishment

Although there were 20 individual respondents, one of these represents 3 separate businesses currently operating in Downtown Whitehorse. Therefore, for questions 4 through 10, the responses relating to basic business operations (type of business, basic lease information, floor area, staff, etc.) were included from each of the three businesses. In order to generate fair results, however, each respondent was only afforded one response for all questions involving qualified opinions or rankings.

The breakdown of surveyed businesses in Downtown Whitehorse is as follows:

Table 3.1: Surveyed Businesses

Business Type	Amount of Businesses	% of Businesses
Independent/unique	18	82%
Chain or franchise	3	14%
Other (office)	1	4%

This high representation from independently owned and operated establishments is not surprising and reflects a number of issues at the forefront of independent retailers' minds, including the rise of large chain stores, parking (typically not an issue with most chain stores, particularly box format retailers), and cleanliness/maintenance/noise issues being common challenges with street retail locations.

3.2.3 Q5. Occupation of Premises

The land tenure breakdown for survey respondents is:

Table 3.2: Land Tenure

Land Tenure Type	Amount of Businesses	% of Businesses
Own	9	41%
Lease or rent	13	59%

The ownership proportion is somewhat higher than expected, as the great majority of Downtown retail establishments, particularly those run by independent owner-operators, tend to operate on a commercial lease. This is typically due to the high cost of downtown commercial land and to the fact that many street retail districts tend to encompass a number of multi-tenant projects typically managed in a similar fashion to small shopping centres.

3.2.4 Q6. Length of Lease Remaining

The length of time remaining on survey respondents' commercial leases breaks down as follows:

Table 3.3: Lengths Commercial Lease Remaining

Lease Type	Amount of Businesses	% of Businesses
Within the next 12 months	2	15%
Within the next 1 to 2 years	7	54%
Within the next 2 to 3 years	3	23%
Other (6 years)	1	8%

Although these numbers on their own do not tell us much, they are an effective reminder that a business operation's life in a particular Downtown location is finite, and that shifting market forces can lead to the relocation of existing retailers and service providers, even those who have been operating in the same location for 10 or more years.

Relevant local market facts and trends to consider include:

- Growth and remaining capacity of Argus development in automotive-oriented North End Service Commercial area.
- Relative lack of newer or high quality and available commercial space within Downtown Whitehorse
- Drawing power of larger big-box retailers, not only in terms of customers, but also with respect to smaller retailers, many of whom tend to locate in proximity to such retailers to benefit from this traffic generation.
- Need/stated to desire to reinforce the vitality of existing street retail areas in Downtown Whitehorse, including Main Street.
- Relocation patterns of local businesses – dominated by moves to either the Argus end of Downtown or the Main Street/core area.
- Struggling older shopping centre models such as Qwanlin Mall and even Yukon Centre Plaza (along Second Ave.) have experienced direct impacts as a result of these locational trends; this pattern has created the need to consider alternative land use mixes and project types for these high profile sites.
- Big box retail trends will also yield major new vacancies and/or redevelopment sites; the planned replacement of the existing Canadian Tire store to a larger site and store model at the Argus development is evidence of the big box growth trend and larger retailers need to further the growth of their latest store models. In the case of Canadian Tire, the new "Associate Store" model, which competes with the likes of Zellers, Wal-Mart, and Sears in some important retail categories, is too large to be properly accommodated in the present location.

3.2.5 Q.7 Floor Area

Surveyed Downtown businesses ranged in size from 200 to 36,000 sq.ft., with an overall average of 6,313 sq.ft. As the few larger units included in the survey skew the average, it is important to look at the overall proportions by size range:

Table 3.4: Proportions of Retail Floor Area

Floor Area (sq.ft.)	Amount of Businesses	% of Businesses
Under 1,500	7	32%
1,500 to 2,999	3	14%
3,000 to 5,000	7	32%
5,000 to 9,999	1	5%
10,000 or greater	4	18%

Typically one would find that chain stores tend to be larger, on average, than many independently run operations, which are not subject to the pressure of standardized store models and sizes.

3.2.6 Q8. Number of Staff

In total, respondent businesses employ 146 full-time and 92 part-time staff, for an overall average of roughly 6 to 7 full-time and 4 to 5 part-time staff. These totals are skewed somewhat by the few chain store respondents who employ 49 full-time (34%) and 40 part-time (43%) staff, despite only accounting for 14% of total participants.

Net of chain operations, respondent businesses employ, on average, 5 to 6 full-time and roughly 3 part-time staff.

There are also a handful of businesses that hire seasonal summer staff in order to deal with increased business volumes during high tourist season.

3.2.7 Q9. Business Hours

A typical response to this question indicated the following hours of operation:

Table 3.5: Hours of Operation

Day/Time of Operation	Typical Hours/Notes
Monday to Friday	9 or 10 AM to 6 PM
Saturday	9 or 10 AM to 6 PM
Sunday	Closed (13 of 21 of businesses) or 10 AM to 6 PM (8 of 21 businesses)
Summer hours	A handful of respondents with extended summer hours (some Sundays, mainly evenings)

Although the respondent sample is relatively limited, it does support observations made during UMA's review of Downtown Whitehorse conditions, one of the first tasks undertaken as part of the Downtown Plan process. These observations include:

- Limited nightlife (lack of late night eateries, bistros, pubs, live music venues).
- Relatively limited hours of business operation (majority of businesses closed during evenings and on Sundays).
- Importance and implications of tourist activity/tourist season on the local economy, in particular on the Downtown retail mix and associated seasonal retail hours (significant number of tourist-oriented businesses open evenings and on Sundays during "high tourist season"/Summer).

Although these results must be interpreted with some caution, they nevertheless reference a concern/issue that was often raised during the Downtown Plan process, namely that Downtown Whitehorse offers very limited opportunities for shopping and entertainment beyond conventional work hours. Although this has been improving recently with more businesses operating during evening hours and on Sundays, (particularly during the Summer months), there is considerable room for improvement.

The popularity of existing local establishments which are open during the evenings is evidence of a local appetite for more variety in terms of nightlife, both social and commercial, in the downtown area. The following should be viewed as having particularly positive implications for enhancing the Downtown experience for both shoppers and local residents, including future Downtown residents:

- New and improved movie theatres and cinema (see Section 5 of this report for a list of initial recommendations, including movie theatre development).
- Arts and culture venues, such as those proposed for the Arts & Heritage Village on the waterfront.
- Bistros, cafes, restaurants, and dessert establishments with extended evening hours (complementing residents' and visitors' enjoyment of Downtown Whitehorse arts, culture, and entertainment activities).

3.2.8 Q10. Length of Time in Current Location

The vast majority of surveyed Downtown businesses have been operating at their current Downtown location for at least 5 years, which is indicative both of the high proportion of independents (vs. chains) surveyed and of considerable loyalty to existing retail locations (particularly the Main Street area). Survey responses are summarized as follows:

Table 3.6: Time Spent in Current Location

Time	Amount of Businesses	% of Businesses
Less than 1 year	1	5%
1 to 2 years	1	5%
2 to 5 years	3	14%
5 to 10 years	5	23%
10 to 20 years	4	18%
More than 20 years	8	36%

These numbers are indicative of an established group of retailers and service providers in Downtown Whitehorse with a loyal following – an important base upon which a more diverse mix of establishments can be added over time. Although it is often important from a real estate investment perspective to attract and retain a healthy number of chain establishments, particularly for higher rent locations, it is clear from the Downtown Plan public consultation process that there is wide public support for well established independently owned and operated businesses. These are viewed, and rightly so, as being vital in maintaining the overall character of Downtown.

3.2.9 Q11. Primary Customer Base

Respondent business owners and operators indicated their business' primary customer base to be as follows:

Table 3.7: Customer Base

Customer Type	Amount of Businesses	% of Businesses
Mainly Downtown Residents	0	0%
All Whitehorse Residents	16	53%
Mainly Tourists and Visitors	8	27%
Other (Corporate, Business)	1	3%
Other (Seasonal differences, Yukon-wide)	5	17%

More than half of the respondent group of business owners and operators sees their primary customer base as being residents of Whitehorse as a whole rather than simply Downtown residents. This is not

surprising given the relatively small Downtown population and the corresponding need to cater to a wider group of residents/consumers.

3.2.10 Q12. Business Revenue Comparison

According to the majority of respondent businesses, business (measured in terms of sales volume) is better now than it was 5 years ago. Survey results comparing current business to that of 5 years ago are as follows:

Table 3.8: Business Revenue 5 Year Comparison

Comparison	Amount of Businesses	% of Businesses
Business is better than it was 5 years ago	13	65%
Business is the same as it was 5 years ago	4	20%
Business is worse than it was 5 years ago	3	15%

Given the extent of new development within the last 5 years, in particular large-scale retail development in the north end of Downtown, these results reflect a strong vote of confidence with respect to the local business climate in recent years. This is especially important given the high proportion of independent business operators participating in the survey.

Responses comparing current business to that of 1 year ago are also very encouraging:

Table 3.9: Business Revenue 1 Year Comparison

Comparison	Amount of Businesses	% of Businesses
Business is better than it was 1 year ago	9	43%
Business is the same as it was 1 year ago	10	48%
Business is worse than it was 1 year ago	2	9%

This qualitative commentary is indicative of a healthy Downtown business climate, one in which the majority of business operators are succeeding in growing or at least maintaining revenue levels.

3.2.11 Q13. Locational Plans

Plans for respondents' Downtown business facilities (within the next 5 years) were recorded as follows:

Table 3.10: Location Plans over the Next 5 Years

Plans (within 5 years)	Amount of Businesses	% of Businesses
Remain in present location, minor renovations planned	15	68%
Remain in present location, major renovations planned	5	23%
Relocate but remain Downtown	0	0%
Relocate outside of Downtown	0	0%
Other (unsure, undecided, no answer)	2	9%

These results are especially encouraging, as they indicate a willingness and/or desire on the part of business owners to continue operating in their current Downtown location, which will have positive implications for Downtown retail development. One of the most critical factors in the maintenance and development of a vibrant Downtown is the enhancement of existing retail areas, particularly those which are currently successful. This desired reinforcement of existing retail concentrations such as Main Street is not possible when existing businesses are not committed to their Downtown location.

3.2.12 Q14. Strengths of Downtown Location

Respondents were asked to identify the top 3 strengths of their current Downtown location, with results as follows:

Table 3.11: Strengths of Downtown Location

Strength Listed	Frequency of Response
Location on, or within close walking distance to attractive Main Street, waterfront area	17
Close to complementary businesses, high quality retail mix	6
Easily accessible location, strong vehicular traffic	6
Convenience of parking, angle parking on Main St.	5
Foot traffic, pedestrian flows, close to bus routes	3
High visibility, window space, store signage	3
Market stability	1
Able to control hours of operation	1
Renovated Hougen Centre	1
Newly renovated space	1
Close to major hotels, banking services	1
Generally quiet location	1
Loyal clientele	1
None	1

Responses indicate particularly strong support of Main Street and the benefits of properly integrating both pedestrian and vehicular traffic in these areas. Proximity to Main Street and the waterfront was by far the most often cited strength of participating Downtown business locations.

As stated in the draft Downtown Plan, and in support of the Transportation initiatives undertaken to date, the current configuration of Main Street and the surrounding street network with its two-way streets and both angle and metered parking areas within the Downtown core area is believed to be a critical factor in the current and ongoing success of Main Street as the heart of Downtown Whitehorse. Such a street and parking pattern tends to provide businesses with an optimal balance of visibility and both accessibility and exposure to pedestrian and vehicular traffic.

While not all resident motorists are content with the two-way traffic flows and angle parking configuration along Main Street, these are undoubtedly significant factors in the area's ongoing success and ability to compete with new growth in the more automotive-oriented north end of Downtown.

3.2.13 Q15. Weaknesses of Downtown Location

Identified weaknesses of respondents' Downtown business locations are as follows:

Table 3.12: Weaknesses of Downtown Location

Weaknesses Listed	Frequency of Response
Parking is poorly managed, lacking, public perception is weak	10
Criminal activity (drug use/trafficking, break-ins, vandalism)	5
Panhandlers, loiterers, disruptive behaviour	4
Cleanliness and maintenance is lacking, poorly enforced	3
Poor visibility/access of store, inconvenient location for customers (i.e. basement or second floor space)	3
Poor quality space, lack of overall vibrancy, buildings in need of renovation, need for redevelopment	3
Second Avenue traffic can be a problem for pedestrians	1
Goods movement – delivery problems	1
Lack of proper RV parking	1
Further development of Argus site a challenge for small retail	1
Customers must drive to the store, not walkable	1
Poor Downtown marketing efforts, lack of promotion	1
Closure of First Avenue at YTG, lack of traffic light for left turn	1
Too removed from busy areas, major foot traffic	1

Surprisingly, the most often-cited weakness of respondents' business location related to parking issues. As noted during the Downtown Plan public consultation process, public and perception of the quality and availability of parking varies widely. While most residents and business owners and operators do not see parking as a problem, there are some significant complaints, particularly with respect to:

- Pressure on existing Downtown parking capacity brought about by new and proposed development projects
- Full-time employees taking up parking spots better suited to customers and visitors
- Insufficient monitoring of parking areas to enforce regulations in metered and timed parking areas
- Need to at least consider a centralized parking facility

As determined through the course of the Downtown Plan public and stakeholder consultation process, the recommended course of action with respect to this issue is to initiate a Downtown Parking Management Study. The purpose of such a study would be to enhance what is already working in terms of Downtown parking and to address the above-noted concerns. Although current parking capacity suggests that a multi-level parking facility is not a short-term (i.e. within the next 3 years) requirement, a proper Parking Management Study and associated stakeholder group would be able to address the need for such a facility at some point in the future.

Concerns relating to criminal activity, disruptive behaviour, and vandalism, should be addressed by initiating discussions related to sufficient RCMP patrolling and enforcement of bylaws, as was often stated by participants in the Downtown Plan consultation process. Reports of such activity have increased of late

and stricter enforcement of bylaw regulations is likely to help in stemming such behaviour and in ensuring a safe and comfortable shopping and social environment.

Proper maintenance of equipment, street furniture, and buildings, as well as cleanliness and clearing of sidewalks during the winter season are critical to the vitality of a street retail district such as Main Street (and other Downtown retail areas) as they ensure public safety, comfort and ease of access. An effective, sufficiently funded cleanliness and maintenance program will also ensure that a street retail district can continue to distinguish itself aesthetically from the more utilitarian automotive-oriented development found in the north end of Downtown.

3.2.14 Q16. Area of Greatest Competition

Survey participants indicated the following as representing their particular Downtown business' main area of competition:

Table 3.13: Main Areas of Competition

Competitive Area Mentioned	Frequency of Response
Main Street / Downtown Core area	5
North End Service Commercial area (Argus, Wal-Mart, etc.)	5
None (unique establishment in Whitehorse)	4
Various competing businesses throughout Downtown	2
Highway development in future	1
Yukon Gallery (Downtown Riverfront area)	1

Responses to this survey question are not surprising given that the Downtown currently exhibits a situation of near polar opposites – with the pedestrian-oriented Main Street retail area anchoring the Downtown Core and the automotive-oriented Argus area development becoming the primary focus of the North End Service Commercial area. If properly managed and maintained, these two areas will continue to play essential roles in the further development of a healthy Downtown.

Planning efforts that prevented the Argus development from locating in a highway location must be applauded, as such development has spelled disaster for many Downtown commercial districts in Canada. The City of Prince George, for example, in allowing such large scale development to locate well outside of the Downtown area in a highway location, has made identified Downtown development priorities much more difficult to attain. The Argus development at the north end of Downtown may not be a comfortable walking distance to the Main Street/Core area, but it does draw vehicular traffic from wide geographic region to the Downtown study area.

By balancing out the needs of different target market segments, and offering both automotive and pedestrian oriented shopping environments in Downtown locations, Whitehorse, along with the development community, has at least provided a solid base on which to build a balanced, vibrant Downtown – one that can serve both a local and regional population, as well as tourists and visitors.

3.2.15 Q17. Rating Possible Changes to Downtown

Survey respondents were asked to rate possible changes to Downtown Whitehorse on a scale from 1 (not important) to 10 (extremely important), with results as follows:

Table 3.14: Possible Change Rankings

Possible Change	Average Respondent Ranking
1. Better Downtown cleanliness/maintenance program	7.4
2. Increased tourist/visitor volumes	7.2
3. Superior Downtown marketing efforts	6.8
4. More offices, daytime employment	6.8
5. Increased Downtown population, residential options	5.4
6. More entertainment, events, programming	4.8

Although the above list is fairly self explanatory, comments on some of these changes derived from interaction with stakeholders through the Downtown Plan and Downtown Retail Strategy process to date is in order:

- Cleanliness and Maintenance: As observed through the Downtown Retail survey and Downtown Plan processes, many residents and business owners feel that more should be done to ensure proper sidewalk clearing during the long winter months, clean up graffiti and litter, and maintain repair Downtown street furniture and foliage.

- Tourism Activity: The importance of tourism activity to the City of Whitehorse is undeniable. What needs to be considered is how best to expand the tourism infrastructure and market both Whitehorse and the Yukon to allow further growth to take place.

- Downtown Population: Although survey respondents ranked this relatively low on the scale, this has more to do with the fact that Whitehorse's retail commercial infrastructure is very centered on the Downtown area. In other words, residents of the City as a whole and the larger Yukon/Northern BC region have few realistic alternatives when comparison goods shopping or seeking entertainment. Thus, Downtown businesses tend to generate sales from a wide region and do not rely solely on the relatively small Downtown population. Growth in housing options in Downtown Whitehorse will nevertheless be a key factor in the development of a vital and diverse Downtown. It is also important to recognize that in any given city, those commercial areas which tend to attract and serve local residents also tend to be the areas most popular with tourists and visitors.

- Events and Programming: The fact that entertainment, events, and programming ranked last in terms of importance on the survey is essentially a vote of confidence in the current frequency and quality of Downtown festivals and social activities. Whitehorse and its residents have done an excellent job of maintaining, enhancing, and building on its colourful history through a variety of annual, seasonal events including the popular Yukon Sourdough Rendezvous festival (Feb. 23rd to 26th, 2006). This support has been reiterated throughout the Downtown Plan and Downtown Retail Strategy consultation process.

3.2.16 Q18. Rating Possible Retail Additions to Downtown

Survey respondents were asked to rate possible retail and related business additions to the Downtown Whitehorse retail mix, with results as follows:

Table 3.15: Possible Retail Mix Addition Rankings

Possible Addition to Retail Mix	Average Respondent Ranking
1. Licensed restaurants, pubs, bistros, cabarets	6.8
2. Art galleries and cultural venues/establishments	6.6
3. Specialty clothing stores/boutiques	6.6
4. Fresh/gourmet/health food store	5.7
5. Household furnishings/furniture stores	3.3

Although there was considerable variety in the responses, a small degree of which has to do with a natural desire to limit the number of directly competitive facilities, the above ranking results echo the comments heard from residents participating in the Downtown Plan process. Clearly, both residents and business owners see considerable potential to build on Whitehorse's existing assets, both in terms of retail and cultural businesses and related social activity.

Ideally, both the Core Commercial and Riverfront areas of Downtown are prime candidates for additional licensed restaurants, bistros, live music venues, art galleries and other cultural venues, and a mix of interesting, small-scale, and preferably independently owned and operated shops and boutiques offering specialty or unique clothing and accessories.

Although household furnishings and furniture ranked fairly low in the survey results, a particularly relevant addition to the local retail market would be a kitchen store offering specialty cookware and possibly cooking classes, possibly as part of a larger health food/gourmet food store. Feedback throughout the Downtown Plan consultation process indicated likely sufficient appetite for such an establishment.

3.2.17 Q19. Most Important New Additions to Downtown

The following were listed by respondents as being the most important potential additions to Downtown Whitehorse:

Table 3.16: Most Important Potential New Additions

Potential Addition	No. of Respondents
Specialty/boutique stores such as beads/crafts, kitchen and cookware, trendy/second hand clothing, children's clothing	6
Specialty grocery store, gourmet food store, fresh food market	4
Quality restaurant options (brew pub, steakhouse, outdoor cafes, live music	4
More quality residential options, mixed-use development	3
Cultural venues (museum expansion, true art gallery, artist studios	3
Offices, Downtown employment	1
Better quality retail and service space options/commercial spaces	1
Maintenance and cleanliness more important than new businesses	1
Gym/fitness centre	1
Parking for business use, not just new business	1
Back alley should be physically lower than business property	1

These responses closely reflect resident comments generated throughout the Downtown Plan process. The listed categories, also not surprisingly, closely match the merchandising gaps identified in the Downtown retail-commercial inventory, which was undertaken in November and December, 2005.

3.2.18 Q20. Employee Parking Locations

According to survey results, participating businesses' employees tend to park on-site where space is available, in nearby street parking areas (including 2 hour zones), and in free parking areas along the riverfront. Some employee spaces are rented in neighbouring lots.

As stated previously, there would be considerable benefit to pursuing a Downtown Parking Management Strategy, the goal of which would be to better manage current and future parking capacity in Downtown Whitehorse, particularly with respect to balancing the needs of full-time employees with those of tourists, visitors, and other resident shoppers.

3.2.19 Q21. Frequency of Customer Parking Complaints

Results for this parking-related question indicate how widely perceptions of Downtown Whitehorse parking conditions vary from person to person and business to business:

Table 3.17: Frequency of Customer Parking Complaints

Frequency of Complaints	No. of Respondents	% of Respondents
Never	4	20%
Rarely	5	25%
Sometimes	5	25%
Fairly Often	3	15%
Very Often/Daily	3	15%

As stated in the draft Downtown Plan, and in support of the findings from the previously completed Transportation Plan, parking capacity is not deemed to be a problem in Whitehorse. It is mainly a problem of capacity management and public perception, which should be substantially improved once a Downtown Parking Management Plan is initiated.

3.2.20 Q22. Best Means of Improving Downtown Parking

The wide range of public opinion on parking-related issues is also reflected in participating Downtown business comments:

Table 3.18: Recommended Downtown Parking Improvements

Recommended Improvement	No. of Respondents
Consider a parkade, multi-level parking structure, or covered and controlled parking lot dedicated mainly for Downtown employees and visitors	10
Not a parking capacity problem – needs only better management, improved public awareness/perception	4
More free parking zones, including weekends on City lots	3
Major improvements to transit system, schedule, public transport to and from the Downtown Commercial Core	2
Eliminate parking along the riverfront, on the White Pass lot – space could be better used as open/green/cultural space	2
Do not consider a parkade – a bad idea for Whitehorse	1
Remove parking meters	1
Need more bicycle racks	1
Consider one-way traffic flow on Main Street	1

Although the range of responses here is not surprising given the widely differing opinions on parking recorded throughout the Downtown Plan consultation process, what was somewhat unexpected was the number of comments from Downtown businesses asking for consideration of a multi-level parking structure. This is an issue that could be investigated as part of the recommended Downtown Parking Management Study.

Some preliminary thoughts on consideration of a future multi-level parking structure:

- Shared parking arrangements should likely be investigated in order to maximize use of capacity throughout the day and evening.
- Major redevelopment opportunities may present themselves within the next 10 years that could conceivably incorporate a multi-level parking structure.
- Progressive parkade designs should be investigated – universities have been particularly good at incorporating green/environmental design considerations into their on-campus parking structures. Proper investigation into alternative design concepts may help to allay the fears of some residents rightly concerned about enhancing the look of Downtown Whitehorse.

3.3 Summary of Additional Comments

Survey respondents had the opportunity to provide additional comments or highlight issues of concern. These identified issues and concerns have been organized by category:

3.3.1 Aesthetics/Architecture/Design

- More street planting, landscaping, sidewalks with street furniture (3)
- Improved lighting for attractiveness
- Improve cleanliness and maintenance program
- Look at potential of removing unsightly overhead wires

- Establish architectural design standards for certain areas to improve overall aesthetics of the built environment
- Establish limits on size of big-box stores
- Enforce energy efficiency, environmental building regulation or targets for new buildings and projects

3.3.2 Economic/Financial

- More direct support for entrepreneurs, business owners
- Tax breaks for property owners and developers meeting City's policy objectives
- Need more industry to expand tax base
- Skilled trades in short supply – need better attraction and retention program
- Explore means of better funding required program improvements (i.e. need for improved cleanliness and maintenance program)
- Need utility upgrades and to explore better ways of funding these improvements

3.3.3 Marketing/Promotion/Event Programming

- More events desired, particularly during Summer months
- Need for better Downtown marketing efforts, including travel planner

3.3.4 Merchandising Mix, Retail Gaps

- Open air cafés, boutique stores
- Need artist spaces on waterfront (support proposed Arts & Heritage Village)
- Support proposed development along First Avenue (residential in particular)

3.3.5 Social/Safety

- Drug and alcohol problems, trafficking need to be addressed (3)
- Improved lighting for safety (particularly at night, during Winter months)
- Better/more frequent RCMP patrolling, particularly within Commercial Core and Riverfront areas, mainly to enforce bylaws and enhance security

3.3.6 Traffic Management, Vehicular and Alternative Modes of Transportation

- Improved transit schedule, extension of trolley
- Need for established RV parking Downtown in accessible area
- Undertake parking study to better make use of existing capacity and ensure that new development does not put undue pressure on the existing parking areas
- Encourage more non-vehicular modes of transportation
- More traffic calming measures, roundabouts desired
- First Avenue should have street light access at Lambert & Second Avenue

4.0 Consumer Retail Survey

4.1 Introduction

Given the extent of public consultation undertaken as part of the Downtown Plan process, the Downtown Whitehorse Consumer Retail Survey was intentionally designed to be brief and easily filled out in five minutes or less. The focus of this brief survey was on place of residence, basic shopping patterns, identification of key merchandising gaps (what's missing?), and perceptions and thoughts on Downtown parking.

In order to tie in more effectively with the Downtown Plan process, the survey was administered as part of Public Open House #3, which showcased the draft Downtown Plan. The survey was also available on-line at the City's website (www.whitehorse.ca) and surveys were collected by the City Planning Department throughout December 2005 and January 2006.

The original survey may be found in Appendix B.

4.2 Survey Results

33 respondents filled out the survey, with results are presented below. Results have been summarized question by question.

4.2.1 Q1. Place of Residence

Survey participants' indicated place of residence breaks down as follows:

Table 4.1: Consumer Place of Residence

Place of Residence	No. of Respondents	% of Respondents
Live in Downtown Whitehorse	21	64%
Live in Whitehorse but not Downtown	11	33%
Live in Yukon, but not in Whitehorse	1	3%

As the majority of resident participants in the Downtown Plan public consultation process were residents of the Downtown area, these responses are not surprising. Downtown residents naturally tend to have an even more vested interest in Downtown planning efforts given that they are the residents most directly affected by Downtown development and programs. Downtown is, after all, their immediate daily environment.

That just over one third of respondents were non-Downtown residents is encouraging as it indicates interest in Downtown planning efforts and a sense of ownership of an important part of the City. One of the most vital advantages going for Downtown Whitehorse is that there is very little in the way of comparison-goods shopping (non-convenience retail and services) options outside of the Downtown area, which is as it should be in a City this size. While neighbourhood-scaled supermarkets and other immediate neighbourhood-serving uses such as postal outlets, hair salons, small pharmacies, video rental outlets, professional and medical services, etc. are necessary to properly serve the convenience needs of local residents, community-wide and regional-serving uses should be located in the Downtown area.

One of Downtown Whitehorse's major advantages, which may not be fully appreciated by those who prefer to patronize independent operators, is that larger-scale and chain retail establishments, if properly located and managed, can bring substantial spin-off benefits to a community such as Whitehorse. The fact that regional and local residents and area visitors must come Downtown to shop at the new Wal-Mart and Real Canadian Superstore is very important

4.2.2 Q2. Supermarket Shopping Patterns

Where and how often residents tend to visit supermarkets says a lot about their overall shopping patterns as a food-related trip is often part of a larger "shopping circuit". Typically, a local/convenience-oriented shopping trip might include a trip to the local neighbourhood grocery store, pharmacy, bank, and video rental outlet. When shopping for comparison retail goods such as clothing, housewares, and electronics, shoppers may choose to combine their larger food purchases (weekly or monthly) in one trip. In addition to price, it is this growing importance of convenience to consumers which has led to the popularity and success of such box-format stores as Real Canadian Superstore and Wal-Mart.

While neighbourhood supermarkets offer limited amounts of non-food items, superstore formats such as Real Canadian Superstore and Wal-Mart offer significant proportions of each, as noted below:

- Real Canadian Superstore: Typically 80,000 to 120,000 sq.ft. in size, though later model stores tend to be on the larger end of the spectrum; roughly 50% to 60% of space accounted for by food/supermarket items; remaining floor area dedicated to wide range of department store type merchandise (DSTM) such as clothing, household appliances, books, toys, home furnishings, electronics, and pre-recorded media (CDs, DVDs, video games and consoles).

- Wal-Mart (Canada): Typically 80,000 sq.ft. to 130,000 sq.ft. in size, though latest model stores tend to be larger models; most older models have remained in markets since the Woolco chain was purchased by Wal-Mart in 1994; Whitehorse market is an exception, with Wal-Mart building a smaller store to suit the smaller regional market size. Typically, anywhere from 12,000 sq.ft. to 25,000 sq.ft. is accounted for by food and other supermarket related items, however, this proportion appears to be growing. Larger US model stores (Sam's Club in particular) include full-scale supermarkets and appear to be in Wal-Mart's longer term Canadian market plans.

Overall participants' supermarket shopping patterns, in terms of monthly visits, ranked from highest to lowest, are summarized below:

Table 4.2: Supermarket Shopping Patterns

Supermarket/Food Store	Total Monthly Visits (All)	Average Monthly Visits (All)
1. Extra Foods (Qwanlin Mall)	139	4.2
2. Real Canadian Superstore (RCS)	111	3.4
3. SuperValu (Yukon Centre Plaza)	62	1.9
4. Super A Foods (Riverdale)	43	1.3
5. Super A Foods (Porter Creek)	28	0.8
6. Bigway Foods	8	0.2

As two thirds of survey respondents are Downtown residents, it is expected that results would be skewed toward Downtown supermarkets, as reflected by the above results. Looking only at non-residents of Downtown, the results are not dramatically different.

Table 4.3: Supermarket Shopping Trends among Non-Downtown Residents

Supermarket/Food Store	Total Monthly Visits (Non-Downtown Residents)	Average Monthly Visits (Non-Downtown Residents)
1. Extra Foods (Qwanlin Mall)	40	3.3
2. Real Canadian Superstore (RCS)	35	2.9
3. SuperValu (Yukon Centre Plaza)	31	2.6
4. Super A Foods (Riverdale)	25	2.1
5. Super A Foods (Porter Creek)	14	1.1
6. Bigway Foods	7	0.6

To an outside observer these results might seem counterintuitive, since typically supermarket shopping is seen as quite a localized activity. Reasons for the importance of Downtown supermarkets even to non-Downtown residents include the following:

- Popularity of Real Canadian Superstore: offers patrons a true one-stop shopping experience, which tends to be ideal for those once a week shopping trips.
- Superior "shopping circuit" potential: Downtown supermarkets are better positioned with respect to customers' preference for making the most out of a single shopping trip, as they are located near a variety of other shops and services. The smaller scale SuperValu is located near a liquor store, while the larger Extra Foods store is located at Qwanlin Mall, in proximity to Old Town residences and municipal offices.

4.2.3 Q3. Most Important Additions to Downtown Retail Mix

According to survey participants, the most important additions to Downtown Whitehorse are categorized as follows:

Table 4.4: Most important Additions to Downtown Retail Mix

Important Addition to Downtown	No. of Responses
1. Restaurants, eateries, and cafes	22
• Ethnic restaurants (Thai, Indian, Japanese, etc.)	
• Fine dining restaurants	
• High quality pub/microbrewery	
• Mid-range franchises (Earl's, Moxie's, The Keg)	
• Live music with dining, bistro	
• Ice cream shop (Summer)	
2. Specialty retail	17
• Specialty/unique/second hand clothing	
• Specialty shoe stores	
• Craft supplies, sewing, beads, fabrics	

Important Addition to Downtown	No. of Responses
• Used book store	
• Imported goods store(s)	
• Unique jewellery	
• Specialty foods (health, gourmet, natural/organic)	
3. Entertainment, arts, and cultural venues	9
• Theatre for performing arts	
• Local art gallery	
• Quality cinema, movie theatres	
• Artist studios, workshops	
• Better quality/independent video/DVD rental outlet	
4. Department store and other large (box-format) retailers	5
• The Bay, Sears	
• Home Depot/Revy, Costco, Ikea	
5. Quality hotel(s), tourist accommodations	2
6. Credit Union	1

These results reflect comments generated earlier in the Downtown Plan process, as well as the merchandising gaps highlighted in the Downtown Retail Inventory summarized in Section 2 of this report. Residents naturally want more variety, more of what is currently unavailable in the local market, including a more interesting mix of restaurants, licensed establishments, specialty clothing, boutique retail, and entertainment venues.

Some local residents also noted a desire for specific larger-scale retailers such as major department stores (The Bay, Sears) and other unrepresented big-box stores (Home Depot or Revy, Costco Wholesale, Ikea). Given the size of the trade area market (roughly 34,000 including all of the Yukon and northern BC), as well as the presence of Wal-Mart and existing building supplies (Home Hardware) and furniture stores, these big-box retailers are not likely to be viable in Whitehorse in the foreseeable future.

4.2.4 Q4. Reasons for Not Shopping/Dining/Recreating Downtown More Often

Reasons that were listed by multiple survey respondents include:

Table 4.5: Reasons for Not Shopping/Dining/Recreating Downtown More Often

Why not shop/dine/recreate DT more often?	No. of Responses
1. Budget constraints, shops too pricey/too high end	10
2. Relative lack of specialty stores, retail variety	7
3. Relative lack of quality dining options	6
4. No need to, do this enough, not applicable	6
5. Relative lack of nightlife, entertainment venues	4
6. Downtown not sufficiently pedestrian-friendly	2

Reasons 2, 3, and 5 relate directly to the findings of the Downtown retail inventory. The top response (namely budget considerations, store's price points), however, indirectly raises an interesting topic – that of demographics and differing preferences among shoppers of different income levels.

Although Downtown Whitehorse is beginning to open up to newer residential forms, including more urban-styled condominium projects such as those developed by Kobayashi Zedda Architects, there is a considerable amount of Downtown rental housing. Rental housing generally caters to lower income residents. Lower income residents are more price sensitive, especially when it comes to non-essential and big ticket retail goods and services.

Responses to this question suggest that disposable income should be a consideration in any meaningful evaluation of the Downtown Whitehorse retail mix. Downtown is, after all, as supported in the Downtown Plan, intended to meet the social, shopping, recreation and entertainment needs of all Whitehorse residents – across all age groups and income groups. If this is the goal, then it would appear that more effort needs to be put into attracting shops and services that cater to residents of any income group, but which are particularly valued by those with limited incomes. These might include:

- Used/vintage clothing and accessories stores
- Used bookstore
- Used records, CDs, and DVDs
- Affordable ethnic restaurants (East Indian, Thai, Japanese, etc.)
- Affordable/unique housewares
- Kitchen store with affordable product lines
- Affordable art and picture framing shop
- Affordable children's books, games, and toys

These types of independently owner and operated establishments tend to be popular across all income groups and with both residents and visitors in any given Downtown as they contribute significantly to an area's local character and diversity. These establishments also tend to become informal meeting places for local residents, lending a street retail district in particular a social atmosphere which is attractive to tourists and visitors. This activity is already occurring in Downtown Whitehorse, particularly along Main Street; however, more of the above-noted business types would help to generate more activity.

4.2.5 Q5. Frequency of Downtown Parking Being Seen as a Problem

Survey respondents' responses indicated that, generally speaking, parking in Downtown Whitehorse is not a significant problem.

Table 4.6: Reasons for Not Shopping/Dining/Recreating Downtown More Often

Frequency of Parking Problems	No. of Respondents	% of Respondents
Never/Rarely/I Walk Instead	22	67%
Sometimes/Once in a While	6	18%
Often	5	15%

Few survey participants find Downtown parking to be a problem on a regular basis, which supports the general pattern of comments received throughout the Downtown Plan public and stakeholder consultation

process. Initiation of a Downtown Parking Management Study is highly recommended as a means of maximizing the benefits of existing and future parking capacity.

4.2.6 Q6. Recommended improvement to Downtown parking

Survey participants indicated the following as being the best means of improving Downtown Whitehorse parking:

Table 4.7: Recommendations for Parking Improvement

Recommended Change to Downtown Parking	No. of Responses
1. Attractive multi-level parking structure close to core	9
2. Improve public transit, encourage alternatives to private motor vehicles	6
3. Nothing – it's not really a problem	5
4. More free parking zones and times	3

Other single responses included:

- Improve overall parking management
- Make Second Avenue two la
- Reduce on-site parking requirements or allow for exception zones
- Avoid building multi-level parking garage
- Eliminate parking meters around Main Street

As in the Downtown Retailer and Service Provider survey, it is somewhat surprising that a multi-level parking structure is viewed as a positive potential addition to Downtown Whitehorse, given that parking is not officially thought of as being a problem by the majority of respondents. Based on the previously completed Transportation Study, the consultant's observations over time, and the results of both the stakeholder and public consultation process, the following can be concluded:

- A multi-level parking structure in a central location might be a viable option for managing Downtown parking (particularly for full-time employees); however this is likely a longer term consideration.
- Parking meters around Main Street are deemed a workable means of ensuring sufficient vehicle turnover.
- Improvements to public transit, in particular for moving people to and from the Downtown Core, are deemed necessary in order to provide residents, tourists, and visitors with viable means of moving around Downtown Whitehorse without a private motor vehicle, particularly during the Winter season. Various levels of government and the business community should likely discuss the possibility of funding some sort of public Downtown shuttle service. This will be increasingly important as a selling feature in marketing Downtown living options, particularly for seniors.
- A Downtown Parking Management Study should investigate ways of ensuring proper use of parking capacity over time and of exploring progressive parking strategies which may include shared parking scenarios and green/aesthetically pleasing multi-level parking structures.

5.0 Initial Findings and Recommendations

Before looking in depth at retail market demand for Downtown Whitehorse across a range of important categories, it is worth considering the following concepts and recommendations:

5.1 Downtown Whitehorse Retail Hierarchy

One of the major identified weaknesses of the current Downtown retail-commercial development pattern is that, apart from the cohesive pedestrian-oriented Main Street and automotive-oriented North End Service Commercial area, remaining commercial uses tend to appear somewhat scattered throughout Downtown. There are seeds of cohesive clusters, however, which will be better understood and fostered through a better understanding of the concept of a retail hierarchy.

Just as there are different categories of shopping centres, from smaller scale open-format (rather than enclosed) convenience centres (typically 7,000 to 50,000 sq.ft.) to very large super regional centres of 800,000 sq.ft. or larger in dense urban areas, there are also different categories of retail based on area of geographic influence. It is intuitive to most, for example, that a 3,000 sq.ft. corner grocery store such as Riverside Grocery serves primarily a local Whitehorse resident market, while the much larger box-format Real Canadian Superstore serves the population of a much wider geographic region (essentially all of the Yukon and northern BC).

Following are basic categorizations of retail and related service uses based on area of geographic influence or pedestrian vs. automotive orientation. A clearer understanding of these categories and their associated uses will lead to a better understanding of the optimal role of retail-commercial uses in each of Downtown Whitehorse's six sub-areas. This in turn will allow for development of an appropriate strategy that will result in more effective clustering of complementary uses. Only when a desired pattern of retail-commercial land uses has been clearly outlined, for example, can appropriate market-based incentives be put in place to facilitate such growth.

A. Neighbourhood-Serving/Local Convenience Retail

- Personal service establishments: hair salon, shoe repair, tailor, drycleaner, video rental outlet, post office, etc.
- Professional services: medical, dental, legal, accounting, chiropractic, alternative health services
- Local-serving retail/food services: corner grocer, convenience store, butcher, fishmonger, bakery, flower shop, coffee shop, café

B. Community-Serving Retail, Restaurants and Entertainment

- Retail food: major supermarkets, specialty/gourmet food stores
- Financial services: banks, credit union, investment brokerage
- Pharmacy/drug store: (i.e. Shoppers Drug Mart)
- Specialty clothing: (men's, women's, children's, unisex)
- Specialty electronics: (cameras, cellular, computers)
- Specialty home furnishings

- Family and full-service restaurants
- Bistros, cabarets, pubs, clubs
- Movie theatres, cinemas (urban scale), live theatre venues
- Arts and cultural venues, arts & crafts stores

C. Regional-Serving Retail and Attractions

- Major Department store (i.e. Wal-Mart, Zellers)
- Major supermarkets including big-box stores (i.e. RCS)
- Home improvement centres (i.e. Home Hardware, RONA)
- Medium-scaled box retail (London Drugs, The Brick, etc.)
- Automotive centre (i.e. Canadian Tire)
- Hotels, motels, bed & breakfast establishments
- Tourist attractions and tourist-oriented retail

D. Automotive-Oriented Retail and Services

- Fast food restaurants
- Automotive service outlet
- Gas stations
- Drive-through ATM machines

It is clear in reading through this list that Downtown Whitehorse sub-areas are characterized primarily by one, or possibly two of the above categories of retail and services. One of the significant advantages of the current basic retail development in Whitehorse is that the regional-serving box-format node is located within the north end of Downtown (i.e. Argus development) rather than in a more remote highway location. Thus there is considerable potential to reap spin-off benefits for other, more locally-serving areas of Downtown.

The following table presents a summary of Downtown Whitehorse sub-areas' primary retail orientations on the basis of the above-noted categories:

Table 5.1: Summary of Downtown Whitehorse Sub-Area's Primary Retail Orientations

Downtown Sub-Area	A. Neighbourhood-Serving/Local	B. Community-Serving	C. Regional-Serving	D. Automotive-Oriented
Old Town	X			
Downtown South	X	X	X*	
Downtown Riverfront		X	X*	
Downtown Commercial Core	X	X	X*	
Downtown North	X	X	X	
North End Service Commercial Area			X	X

X* - indicates sub-areas with strong regional draw with regard to tourists/visitors, without necessarily having regionally-serving or large-scale retail establishments

These categorizations are not intended to counter that fact that all of these sub-areas may attract resident and tourist attention from a wide geographic area for a number of reasons unrelated to retail and services. These are only intended to present how the sub-areas' existing retail-commercial concentrations are currently oriented.

The implications of this are elaborated below:

- Old Town: As noted in the Downtown Plan and echoed throughout the public and stakeholder consultation process, there is a desire to maintain a low density residential focus for this area of Downtown Whitehorse. This is deemed desirable for a number of reasons, including provision of much-needed affordable housing for young families, a recognition of the City's history, and provision of home-based businesses which complements other Downtown commercial offerings. This area also adds to the unique character of Downtown Whitehorse, which helps to prevent the "Anywhere North America" or cookie cutter syndrome which has eroded the character of many a downtown core area. In order to make such a neighbourhood really work, however, it is vital that the existing neighbourhood/local service establishments be maintained and enhanced in Old Town. A well-placed cluster of such uses will encourage residents to walk more. It will also generate a better link or transition area between Old Town and the more commercial Downtown North.

- Downtown South: If Downtown South is to be further fostered as a viable residential neighbourhood with an interesting variety of multi-family housing options, then the maintaining and enhancement of neighbourhood-oriented commercial uses is vital. The local Riverside Grocery, while small in scale, serves a vital role both as a local convenience store for Downtown residents, and a conveniently located stop for convenience and even specialty items for residents of outlying areas. More neighbourhood-serving retail and services in this area will also help to foster development of quality tourist accommodations (i.e. bed and breakfast houses). More community-serving restaurants should also be encouraged.

- Downtown Riverfront: This area serves primarily a community-wide and tourist-oriented role in Downtown Whitehorse. Planned upgrades to First Avenue and the proposed Arts and Heritage Village project are strong signs of support for expanded community access to the riverfront area – a trend which has sparked renewed development interest and vitality in many North American centres, small or large. From a retail and service perspective, the most important additions to the riverfront area are food and beverage establishments which tend to generate significant activity throughout the day and evening.

- Downtown Commercial Core: Main Street should continue to be the heart of Downtown Whitehorse – the primary pedestrian-oriented commercial focus of the City. Core area retail commercial uses include both neighbourhood and community-serving establishments; however, the cluster and pedestrian-oriented environment together generate an activity centre of regional importance. The name of the local association representing Downtown business interest (Main Street Yukon Society) reflects this street's importance not only in Whitehorse, but throughout the Yukon. Vital additions which will help to enhance this area's distinctiveness, particularly relative to the North End of Downtown, include small-scale specialty retail stores, specialty clothing boutiques (including vintage/second hand clothing), and more quality food and beverage establishments.

- Downtown North: Downtown North is currently suffering from a lack of focus and a retail trend which sees movement toward either the Main Street area or the Argus development at the north end. The high vacancy rate recorded at both Qwanlin Mall and the SuperValu and liquor store-anchored Yukon Centre Plaza, as well as the planned relocation of Canadian Tire, is evidence of this trend. More than any other, this area is in transition, which leads naturally into a discussion of redevelopment potential. Like the Downtown Commercial Core, Downtown North is at the heart of Downtown and thus serves as an important link between a number of different areas. The residential development potential of this area needs to be explored, possibly as part of a larger mixed-use

redevelopment project. With additional residential uses comes added support for both neighbourhood and community-serving retail and services.

- North End Service Commercial Area: Although this area is deemed suitable for a mix of additional box-format retail tenants over time (the market will help to dictate what can and cannot be supported), it is not an appropriate area for additional uses having a neighbourhood or community orientation. These uses, which typically form important parts of neighbourhood or community shopping centres or street retail districts, are best located in areas which can be accessed on foot, or which contribute in some way to the lifestyle needs of local residents. As mentioned in the Downtown Plan, individual business units of under 450 sq. metres should therefore be discouraged in this area of Whitehorse as they do not fit with the area's regional and automotive orientation. A significant cluster of such uses in this area will only serve to detract from the goals identified for other Downtown sub-areas.

The development of several strip mall formations on the Argus site in 2004 (see table below) is not based on counter-intuitive development planning, but is more likely due to an overall lack of quality retail and service space elsewhere in Downtown Whitehorse. In the case of certain retail tenants, such a location provides an opportunity to test out new retailing concepts. Starbucks, for example, likely chose a location in this area in order to test out its new drive-through coffee concept. This is not, however, deemed to be a high quality location for such as use, as coffee bars tend to require significant volumes of foot traffic. A location within the Downtown Commercial Core, for example, may generate higher sales revenues for Starbucks.

As noted in Appendix C, the list of potential box-format retailers, most of whom are currently not represented in the Yukon, is very long. This should not, however, be cause for great concern on the part of individuals who prefer smaller, more service-oriented establishments, for the simple fact that these larger retail formats require larger trade area populations in order to meet their economic objectives. This is the major reason why even Wal-Mart and Real Canadian Superstore, two of the most successful big box chain retailers, introduced smaller than usual model stores into the Whitehorse market.

It is also likely one of the major reasons behind delay of the planned theatre complex. Typically, a new-format theatre with stadium style seating requires a population of at least 8,000 and preferably 9,000 per screen. With a total trade area population of perhaps 32,000 (including all of the Yukon and northern BC), this market could only effectively support 3 or 4 such theatres and screens. An option which should be considered is a more urban street-scaled theatre complex similar to Fifth Avenue Cinemas in Vancouver, which offers smaller theatres and screens but is more suited to the trade area market size.

Fifth Avenue Cinemas (Vancouver, BC)

Table 5.2: Retail Building Activity - Argus

Business Name	Address	Business Type	Size Sq.ft.	Size Sq. M.	Date Completed
Wal-Mart	9021 Quartz Road	Big box retail store, with in-store McDonald's	82,451	7,660	2001
Honda	1 Chilkoot	Car dealer, servicing	13,541	1,258	2002
Subaru Kia	17 Chilkoot Way	Car dealer, servicing	8,891	826	2003
Ricky's All Day Grill	43 Chilkoot Way	Restaurant	3,617	336	2003
Strip Mall	36 Chilkoot Way	Various (Radio Shack, M&M Meat Shop, Reitman's, Video Games, Dollar Store)	16,469	1,530	2004
Strip Mall	80 Chilkoot	Sandor's Clothing, Video Update, Starbucks	6,889	640	2004

Source: City of Whitehorse Planning Department.

5.2 Supermarket Demand and Implications

What was somewhat surprising in the Consumer Retail Survey results is the popularity (at least with survey respondents), of the Extra Foods store at the underperforming Qwanlin Mall. This is indicative of consumer support for a more traditionally scaled supermarket at this central location. It is important, however, to look at local supermarket demand conditions, in order to develop a clearer understanding of the retail food market. (Other retail categories will be examined in the final stage Retail Strategy report).

Based on an assumed average annual supermarket expenditure of $2,900 per capita, and a total trade area population of approximately 29,000 people, total annual expenditures of roughly $84.1 million represent total trade area potential for supermarket-related sales volume. Based on an industry standard sales productivity target of $520 per sq.ft. per year, this level of sales volume can effectively support roughly 162,000 sq.ft. of supermarket space.

A summary of current supermarket floor area conditions in Whitehorse is presented in the table below:

Table 5.3: Supermarket Floor Area

Supermarket Name	Supermarket-related Floor Area (Sq.ft.)
Real Canadian Superstore	45,000
Extra Foods (Qwanlin Mall)	32,000
SuperValu (Yukon Centre Plaza)	18,500
Super A Foods (Riverdale)	15,300
Super A Foods (Porter Creek)	21,800
Bigway Foods	9,600
Wal-Mart	12,000
Other Whitehorse (convenience, etc.)	10,000
Whitehorse Supermarket Total	**164,200**

This total of roughly 164,000 sq.ft. does not include any related floor area located within the trade area (Yukon + northern BC) outside of the City of Whitehorse. It is clear from these numbers and the results of public consultation on both the Downtown Plan and Downtown Retail Strategy that:

- A new supermarket is not warranted in this market unless an existing store were to close
- The Qwanlin Mall site is deemed to be most suitable for the maintenance or enhancement of a traditionally-scaled (i.e. 35,000 sq.ft. or less) supermarket as it provides easy access to Downtown residents

5.3 Downtown Whitehorse Marketing Considerations

A major consideration for effective Downtown marketing lies in the accessibility of quality information for the public at large. One versatile means of doing this well is to establish a Downtown Whitehorse web site, which would ideally provide information to all of the following target users:

- Tourists and visitors
- Local and Downtown residents
- Prospective Downtown residents
- Prospective Downtown business operators
- Prospective land developers
- Prospective investors
- Prospective out-of-town shoppers

In order to gain perspective on what information and features work best to serve the above-noted target groups, a review of 17 Canadian downtown websites was conducted, with detailed results as presented in Appendix D. These websites were reviewed based on factors including visual appeal, ease of site navigation, photographic content, market/business development information, retail shopping and entertainment information, tourist/visitor orientation, real estate market information, and quality of external links.

Based on this review, the following were rated most highly:

Table 5.4: Top Rated City Websites

Rank	Website	City
1.	www.downtowncalgary.com	Calgary, AB
2.	www.downtownvancouver.net	Vancouver, BC
3.	www.reginadowntown.ca	Regina, SK
4.	www.downtownwinnipegbiz.com	Winnipeg, MB
5.	www.nanaimodowntown.com	Nanaimo, BC
6.	www.downtownkelowna.com	Kelowna, BC
7.	www.downtownoshawa.com	Oshawa, ON
8.	www.downtownvernon.org	Vernon, BC
9.	www.downtownsaskatoon.com	Saskatoon, SK
10.	www.downtownpg.com	Prince George, BC

This review is intended only to generate discussion as to what content and style would be most appropriate for a Downtown Whitehorse website. Ideally, such a site would be maintained by a Downtown association such as a BIA, which would have an annual budget generated by various levels of government as well as through a small levy on Downtown businesses. Creation of a BIA, which would represent an expansion of the current Main Street Yukon Society's mandate, would require further evaluation and discussion.

5.4 Guiding Principles for Effective Retail-Commercial Development

The following guiding retail-commercial planning principles are highly recommended for effectively shaping the future of Downtown Whitehorse from a commercial perspective:

- Priority on enhancing existing retail concentrations before developing new ones.
- Require market/impact study on commercial developments over a certain size (say 1860 m^2 or about 20,000 sq.ft.), in order to ensure sufficient market support and to prevent undue impacts on existing retailers and service providers.
- Encourage Downtown residential development , which will generate an essentially captive market for a range of goods and services and prevent over-building of commercial uses.
- Locate community and regional-serving uses in the Downtown area wherever possible; development of a competing highway-oriented commercial node is to be avoided as it runs counter to stated Downtown objectives.
- Locate neighbourhood-oriented uses in areas deemed most appropriate for such development, namely: Downtown South, Old Town, Downtown North, and the Downtown Commercial Core.
- Actively investigate ideas and concepts for identified high priority Downtown redevelopment sites, which in turn can help to stimulate private sector investment and development interest.
- Seriously pursue improved public transit service to and from Downtown, but in particular within Downtown (i.e. a "transit loop"). A Downtown shuttle service should be explored, possibly through a partnership between various levels of government, as a means of ensuring sufficient resident and tourist/visitor access to all areas of Downtown Whitehorse throughout the calendar year.
- Public washrooms: find a way to integrate an easily maintained quality public washroom facility in the Downtown Commercial Core and/or within the Downtown Riverfront area – it is vital to cover the basics/essentials in order to ensure that residents and visitors alike spend more quality time Downtown – shopping, socializing, and recreating.

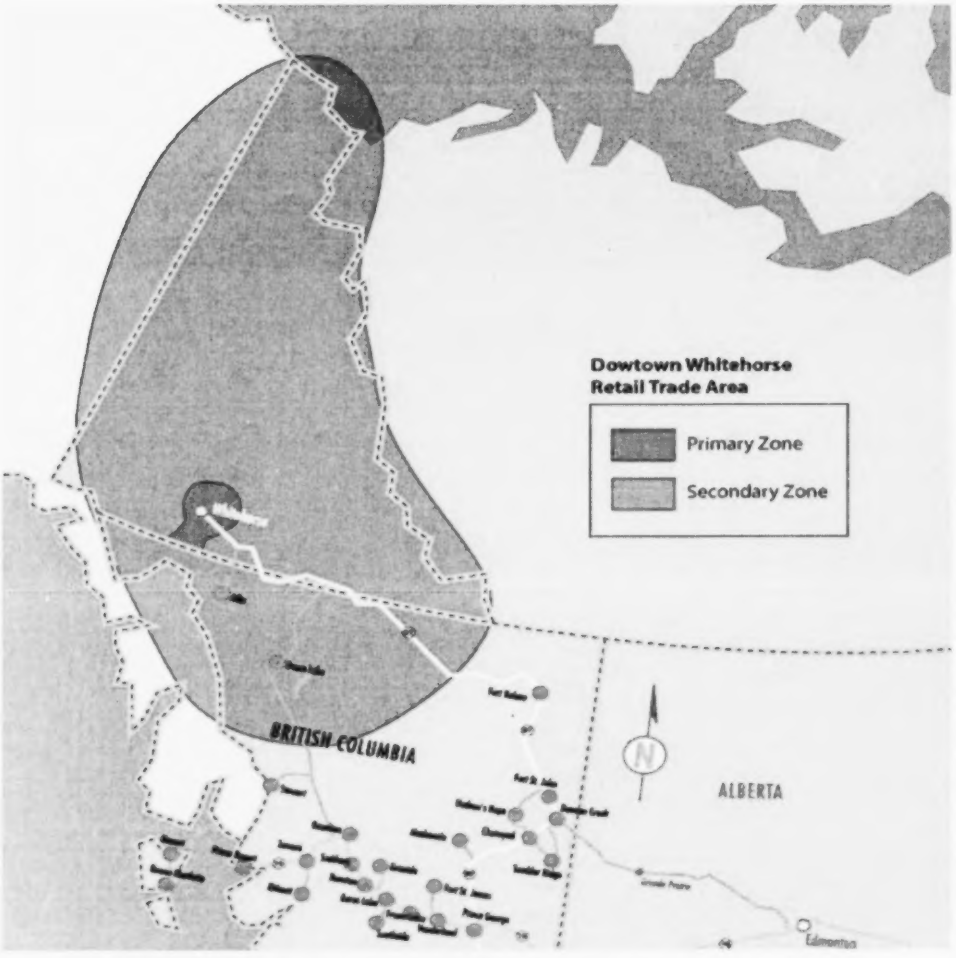
6.0 Retail Market Analysis

In order to generate realistic development and redevelopment goals for Downtown Whitehorse, it is important to look at the market-based potential for a range of broad retail and related categories in terms of both total sales dollars and warranted floor area.

6.1 Downtown Whitehorse Retail Trade Area

The City of Whitehorse is the major retail and service centre for all of the Yukon as well as a portion of northern British Columbia. As Downtown Whitehorse contains the vast majority of the city's retail infrastructure, the Downtown Whitehorse trade area covers the same geographic area as that for the city as a whole. This trade area boundary is shown below.

Figure 6.1: Downtown Whitehorse Trade Area Boundary



The Downtown Whitehorse retail trade area is broken down into two sub-zones, primary and secondary, in order to reflect different levels of anticipated market capture:

- Primary Zone: Includes the Whitehorse Census Agglomeration (CA), which includes the City of Whitehorse, the hamlets of Ibex Valley and Mt. Lorne, and other unincorporated areas.
- Secondary Zone: Includes the remainder of Yukon Territory, as well as a portion of northern British Columbia, including the towns of Atlin and Dease Lake and surrounding unorganized lands

Extension of the geographic trade area is constrained by the following:

- To the south: Further extension of the trade area boundary is limited by driving distances and the size and location of other municipal centres such as Terrace (with a 2001 population of nearly 21,000) and Prince Rupert (with a 2001 population of over 15,000), which have significant retail markets of their own.
- To the east: Further trade area extension is limited by driving distances along Highway 97 and proximity to the retail offerings of Dawson Creek (2001 population of 16,000) and the much larger regional-serving retail and commercial in the Prince George CA (2001 population of 85,000).
- To the west: Further trade area extension to the west is not appropriate given the presence of the U.S.-Canada border and the major population and retail-service centre of Anchorage, Alaska (2000 population of nearly 261,000, est. 2006 population of 283,000).

6.2 Trade Area Population Growth

Although Yukon provincial population growth was essentially flat between 1996 and 2004 (as shown below), the most current Yukon medium-growth population projection forecasts modest growth and a 2016 population of nearly 33,000 (32,914). The trend shows moderate growth within the City of Whitehorse and other smaller urban centres, but decreasing population in the rural/more remote areas of the territory.

Table 6.1: Historical and Projected Yukon Population

	1996	2001	2004	2016 (projected)
Yukon Population	30,766	28,674	30,400	32,914

Sources: Statistics Canada, Yukon Bureau of Statistics

Based on the migratory trend toward urban centres, and historical population growth patterns over the last decade, the Downtown Whitehorse retail trade area population is forecast to rise as follows:

Table 6.2: Historical and Projected Downtown Whitehorse Retail Trade Area Population

Trade Area Zone	2001	2006	2011	2016	2021
Primary Zone (Whitehorse CA)	21,405	23,638	24,416	25,220	26,051
Secondary Zone*	8,469	8,385	8,301	8,218	8,137
Total Trade Area	29,874	32,023	32,717	33,439	34,187

Notes:

* Secondary Zone includes the Yukon and Northern B.C., less the Whitehorse CA

Assumed growth rates: Primary Zone (+0.5% per annum), Secondary Zone (-0.20% per annum)

Source: Statistics Canada Census data, UMA trade area projections

In summary, this is not a high growth trade area, however the quality of employment opportunities (mainly government positions), associated pay scales, and lifestyle advantages of living in the Yukon (access to outdoor recreation opportunities and growing cultural/arts scene) is yielding moderate growth. Barring significant economic downturns, this rate of population growth is deemed reasonable and achievable over the forecast study period. The proposed Alaska-Canada Rail Link, if constructed, would serve to increase local business and employment opportunities and could contribute to higher than forecast growth rates.

6.3 Historical Whitehorse Tourism Activity

Beyond simply trade area residents, tourists and visitors represent an important and growing source of retail, restaurant, entertainment, and related expenditures. According to Yukon Bureau of Statistics data, and as shown in Table 6.3, overall tourism activity (as measured by Yukon border crossings) increased by roughly 25% since 1991, topping 324,000 border crossings in 2005.

Highlights of this review include:

- **North American** visitors account for the vast majority of all Yukon tourism activity, although this is changing slowly over time. In 1991, Canadian (24%) and U.S.(70%) visitors made up 95% of all border crossings. In 2005, the Canadian (20%) and U.S. (71%) share of total volume dropped to 91%, due mainly to growth in the number of visitors from other areas of the globe. Canada's visitor volume increased only marginally (1,700 crossings) over the period, resulting in a decreased share of overall activity. U.S.-related activity, however, rose by 21% or over 48,000 border crossings.
- **European** border crossings nearly doubled over the same period, reaching nearly 21,000 in 2005. The top two European visitor groups were from Germany and the United Kingdom.
- **Asia/Pacific** tourism has also been on the rise, more than doubling over the period – from just over 2,900 crossings in 1991 to nearly 6,500 in 2005.

Many traveling visitors are attracted to the area due to its unique landscape and features (i.e. the Northern Lights), outdoor recreation opportunities, history, and to experience a different climate or culture than might be expected from a more typical destination.

Relevant highlights of the 2004 Yukon Visitor Exit Survey, conducted jointly by the Yukon Government's Department of Tourism and Culture and the Yukon Bureau of Statistics, are:

- **Visitor Volume:** In 2004, 251,704 people visited the Yukon – 8% greater volume in 1999 (232,766) and 22% greater than in 1994 (206,800). Visitor parties or groups totalled 108,808 in 2004, up from 98,854 in 1999 and 88,100 in 1994. The average visitors per party in 2004 was 2.3. U.S. parties are typically larger than those from other parts of Canada (2.5 vs. 1.8).
- **Nature of Visit:** 83% of Yukon visitors were on a "pleasure trip", 47% of visitor parties travelled by car/truck/van/motorcycle, 29% of visitor parties came on a prepaid package trip, 21% travelled in an organized tour group – the most frequently mentioned visitor activity was "shopping" (64% of survey respondents)
- **Visitor Spending:** Based on survey results, visitors spent over $75.8 million in the Yukon in 2004, up 12% from 1999 ($67.7 million) and roughly 40% from 1994 ($54.2 million). A typical visitor party spent $396 during their stay in the Yukon, which equates to roughly $171 per visitor.
- **Visitor Spending Per Day:** Over the 1994 to 2004 period, Canadian visitor spending per person per day rose from $65 to $90, while per diem spending by U.S. visitors remained fairly steady ($79 in 1994, $76 in 2004). Per person per day spending from other country's visitors dropped from $70 to $59 over the same period.
- **Length of Stay:** Canadian visitors typically stayed in the Yukon for 8 nights, while their U.S. counterparts stayed for 3 nights.

One of the key outputs of the study, in terms of understanding spending patterns, is a breakdown of expenditures by category based on a $100 amount.

Table 6.4: Breakdown of Visitor Spending By Category

Visitor Spending Category	All	Canada	U.S.	Other
Transportation	$33	$30	$36	$30
Accommodation	$19	$23	$17	$13
Groceries and Alcoholic Beverages	$10	$10	$8	$13
Meals/Refreshments in Restaurants/Bars	$16	$17	$16	$12
Outdoor/Wilderness Activities	$2	$1	$2	$5
Admissions to Museums/Interpretive Centres	$1	$1	$1	$1
Entertainment and Recreation	$2	$4	$2	$1
Yukon First Nation Arts, Crafts, Souvenirs	$2	$3	$1	$3
Other Arts, Crafts, Souvenirs	$8	$8	$9	$5
Other Expenses	$7	$3	$8	$17

Source: "2004 Yukon Visitor Exit Survey. Yukon Government Department of Tourism and Yukon Bureau of Statistics

Transportation, accommodation, food and beverage-related expenditures account for the vast majority of visitor spending – 78% for visitors as a whole, 80% for Canadian visitors, 77% for U.S. visitors, and 68% for visitors from elsewhere. Spending on "arts, crafts, and souvenirs" (for both First Nations and non First Nations goods) accounts for an average of 10% of visitor spending – indicating significant interest in local culture, crafts, and gift items.

If the increase in per person, per day spending generated by Canadian visitors over the 1994-2004 period is any indication, there is likely untapped potential to generate more spending on retail goods and services, entertainment, as well as food and beverage. One clear difference between the three broad visitor categories is that non-North American visitors tend to spend relatively less on accommodation and relatively more on "other expenses", which includes spending on retail goods such as clothing, equipment, and supplies.

Although catering to tourists (in terms of providing them with desired accommodations, entertainment, shopping and services) is important, what has proven to be true time and time again in cities throughout North America is that tourists ultimately flock to those areas of a city most loved by local residents. Thus, it is important for the various sub-areas of Downtown Whitehorse to develop further as places that cater to the needs and desires of local and regional residents.

6.4 Historical Annual Yukon Retail Sales

Historical annual retail sales volumes are tracked by Statistics Canada and reported by the Yukon Bureau of Statistics. These data represent actual sales data and so by definition include both local/regional resident and tourist/visitor spending.

Table 6.5: Yukon Retail Sales by Major Category

Yukon Annual Retail Sales ($000's, by trade group, not adjusted)			
Trade Group	**1996**	**2001**	**2004**
Category Sales ($)			
Automotive	$87,993	$134,518	$154,488
Food and Beverage Stores	$101,529	$114,418	$121,547
Clothing and Accessories Stores	$12,378	$14,845	$14,266
General Merchandise Stores	$17,849	$32,965	$57,686
Other Trade Groups*	$78,507	$82,845	$77,119
Total Retail Sales	**$298,256**	**$379,591**	**$425,106**
Yukon Population	**30,766**	**28,674**	**30,400**
Per Capita Retail Sales	**$9,694**	**$13,238**	**$13,984**
Category Sales as % of Total Sales:			
Automotive	30%	35%	36%
Food and Beverage Stores	34%	30%	29%
Clothing and Accessories Stores	4%	4%	3%
General Merchandise Stores	6%	9%	14%
Other Trade Groups*	26%	22%	18%

Source: Statistics Canada Retail Trade, Cat. 63-005. Reported by Yukon Bureau of Statistics.

What is immediately apparent from these figures is the significant rise in overall retail sales volume over the 1996 to 2004 period, but with essentially flat population growth. Key changes include:

- Automotive sales: Relative to 1996's total of roughly $88 million, automotive sales increased by 53% in 2001 ($134 million) and by 76% in 2004 ($154 million). This spike in auto sales is usually correlated with increases in quality employment opportunities and thus wages and disposable incomes. According to Yukon Bureau of Statistics employment data, between 1996 and 2004, Yukon's labour force rose from 15,700 to 16,300 – a difference of 600 jobs. This increase, however, came almost exclusively within the public sector, where wages are significantly higher on average than in private sector positions.

- General Merchandise sales: Statistics Canada tracks sales of "Department Stores", "Warehouse Clubs and Superstores", and "Other General Merchandise Stores" and reports them under the umbrella heading of "General Merchandise". As noted in Table 6.5, Yukon sales volume in this category rose dramatically over the 1996 to 2004 period. The introduction of Real Canadian Superstore, and even more importantly, an 80,000 sq. ft. Wal-Mart store in the Argus development and associated spending by both trade area residents and tourists/visitors (notably RV visitor parties) is the major reason for this increase.

- Food and Beverage sales: Food and beverage sales in the Yukon rose significantly, but less dramatically than either the auto or general merchandise categories. Between 1996 and 2004, total food and beverage sales volume rose 20%, from $101.5 million to $121.5 million. Much of this increase can be attributed to increased tourism activity, as Yukon border crossings rose by more than 13,000 over the 1996 to 2004 period.

During this period, significant public sector employment growth led to increased average incomes in the Yukon (especially the City of Whitehorse). During periods of rising incomes, it is higher priced luxury goods which tend to see the most dramatic rise in quantities sold, due to the income elasticity of demand.

A consumer who experiences a significant increase in income, for example, is much more likely to spend more on luxury goods she could not previously afford rather than purchase more staple goods such as bread and rice. Thus, the increase in food and beverage sales is most directly related to the increases in population and tourism activity.

It is not surprising that "clothing and accessories" sales increased only modestly over this period, as this category is tied mainly to local/regional population growth.

6.5 Retail and Related Per Capita Expenditures by Category

As there are different sources of information on spending patterns, there are different ways of forecasting retail demand for a given trade area. In the present case, with only modest trade area population growth and given the difficulties in effectively assessing tourist/visitor spending with any degree of accuracy, it is deemed most appropriate to forecast demand based on actual retail sales volumes by category (as tracked by Statistics Canada).

Table 6.6: Whitehorse Household Spending By Category

Average Household Spending	1992	2003	% Change
Shelter	***$9,369***	***$12,505***	***33%***
Transportation	$7,479	$9,045	21%
Food	$7,328	$8,695	19%
Recreation	$4,556	$5,337	17%
Household operation	$3,129	$3,601	15%
Clothing	$2,793	$2,705	-3%
Tobacco & alcohol	$2,066	$2,362	14%
Household furniture & equip.	$1,978	$2,101	6%
Health care	***$919***	***$1,507***	***64%***
Personal care	$1,018	$981	-4%

Source: "Household Spending in the Yukon, 2003", Yukon Bureau of Statistics.

Not surprisingly, due to increases in real estate costs and the aging of the local population, household shelter and health care costs experienced the most dramatic increase over the 1992-2003 period.

Table 6.7: Whitehorse Per Capita Spending By Category

Average Household Size	2.88	2.58	
Average Per Capita Spending	**1992**	**2003**	**% Change**
Shelter	$3,253	$4,847	49%
Transportation	$2,597	$3,506	35%
Food	$2,544	$3,370	32%
Recreation	$1,582	$2,069	31%
Household operation	$1,086	$1,396	28%
Clothing	$970	$1,048	8%
Tobacco & alcohol	$717	$916	28%
Household furniture & equip.	$687	$814	19%
Health care	$319	$584	83%
Personal care	$353	$380	8%

Source: Derived from "Household Spending the Yukon, 2003" data and household sizes.

Rather than forecasting demand on the basis of these figures (derived from household surveys and thus respondents' educated guesses), the following analysis examines the sales volume and floor area potential for major retail and related categories on the basis of recorded sales activity.

In order to estimate demand on a category by category basis using the previously determined trade area population growth forecast, it is necessary to first examine sales volume by category for a base year, in this case 2004, and then convert these into per capita equivalents based on that year's population, estimated at 30,400. These calculations are shown below in Table 6.8.

It is important to note that, due to the limited scale of Yukon's retail infrastructure, Statistics Canada's data reporting on major retail sales by category is suppressed due to confidentiality agreements.

Although the Yukon Bureau of Statistics reports sales on the basis of "Automotive", "Food and Beverage Stores", "Clothing and Accessories Stores", "General Merchandise Stores", and "Other Trade Groups", it does not report volumes for the categories making up the catchall "Other Trade Groups". For this reason, this category has been broken down into sub-categories based on proportions exhibited in British Columbia, namely:

- Furniture: 10% of "Other Trade Groups"
- Home Furnishings and Electronics: 25%
- Building/Home Supplies: 31%
- Pharmacies and Personal Care: 29%
- Non-Store Retailers: 5%

Based on the above proportions for "Other Trade Groups", per capita spending by category is calculated as shown in Table 6.8.

Table 6.8: Yukon Retail Expenditures Per Capita

Yukon Retail Sales Category*	2004 Sales ($)	Per Capita Equivalent ($)
Automotive	$154,488,000	$5,082
Food and Beverage Stores	$121,547,000	$3,998
*Supermarket/grocery***	*$85,324,000*	*$2,807*
Clothing and Accessories Stores	$14,266,000	$469
General Merchandise Stores	$57,686,000	$1,898
Other Trade Groups***:	$77,119,000	$2,537
Furniture	$7,711,900	$254
Home Furnishings & Electronics	$19,279,750	$634
Furniture, Home Furnishings, Elec.	$26,991,650	$888
Building/Home Supplies	$23,906,890	$786
Pharmacies & personal care	$22,364,510	$736
Non-store retailers	$3,855,950	$127
Total Retail Sales	**$425,106,000**	**$13,984**
Restaurant, caterer, tavern sales:	$36,223,000	$1,192

Notes:

* Statistics Canada data (Retail Trade, Restaurant/Caterer/Tavern

** Food and Beverage, less Restaurant/Caterer/Tavern sales

*** Category sales breakdown estimated on basis of B.C. breakdowns – data suppressed for the Yukon due to confidentiality agreements.

These per capita expenditure figures serve as base year (2004) expenditures for calculation of trade area-wide expenditure potential for each category, as described in the following subsections.

Retail Market Analysis By Major Category

Table 6.9: Warranted General Merchandise Floor Area

Table 6.9: Warranted General Merchandise* Floor Area

	2001	2004	2006	2011	2016	2021
Primary Trade Area (Whitehorse, City)						
Population	21,405	21,728	23,638	24,235	24,847	25,474
Avg. annual per capita gen. merch. expenditure		$1,898	$1,907	$1,917	$1,927	$1,937
Annual general merchandise expenditure potential		$41,229,708	$45,077,666	$46,458,282	$47,879,881	$49,343,650
DT Whitehorse Market Capture (%)		75%	75%	75%	75%	75%
DT Whitehorse Market Capture ($)		$30,922,281	$33,808,250	$34,843,712	$35,909,911	$37,007,738
Secondary Trade Area (Yukon + N. B.C., less City)						
Population	8,469	8,418	8,385	8,301	8,218	8,137
Avg. annual per capita gen. merch. expenditure		$1,860	$1,869	$1,879	$1,888	$1,898
Annual general merchandise expenditure potential		$15,654,769	$15,669,733	$15,595,013	$15,520,226	$15,445,382
DT Whitehorse Market Capture (%)		60%	60%	60%	60%	60%
DT Whitehorse Market Capture ($)		$9,392,862	$9,401,840	$9,357,008	$9,312,136	$9,267,229
Total Trade Area (Yukon + Portion of Northern BC)						
Population	29,874	30,146	32,023	32,536	33,065	33,611
Avg. annual per capita gen. merch. expenditure		$1,887	$1,897	$1,907	$1,917	$1,928
Annual general merchandise expenditure potential		$56,884,477	$60,747,399	$62,053,295	$63,400,107	$64,789,032
DT Whitehorse Market Capture (%)		71%	71%	71%	71%	71%
DT Whitehorse Market Capture ($)		$40,315,143	$43,210,090	$44,200,719	$45,222,046	$46,274,967
Warranted General Merchandise Space (Total)						
$280 per sq. ft.		144,000	154,300	157,900	161,500	165,300
$300 per sq. ft.		**134,400**	**144,000**	**147,300**	**150,700**	**154,200**
$320 per sq. ft.		126,000	135,000	138,100	141,300	144,600
Less Wal-Mart General Merchandise Space:		66,000	(14,000 sq.ft. is "supermarket" floor area)			
% of warranted general merchandise area		49%	46%	45%	44%	43%
"Net" warranted general merchandise area		68,400	78,000	81,300	84,700	88,200

Notes:

* For the purpose of this analysis, "General Merchandise" includes the following retail categories as recorded by Statistics Canada: "Department stores", "Other general merchandise stores", "Sporting goods, hobby, music, and book stores", and "Miscellaneous store retailers".

Assumed population growth rate:

Primary Zone:	0.50%
Secondary Zone:	-0.20%
Assumed expenditure growth rate:	0.65%

6.6 Warranted General Merchandise Floor Area

Based on forecast trade area population growth rates, the per capita expenditure amounts calculated in 6.5, total trade area expenditure potential for "General Merchandise" is now estimated at roughly $60.7 million. Based on modest primary zone population growth, this figure is expected to reach $64.8 million by 2021, as shown in Table 6.9.

Assuming a realistic degree of "outflow", which accounts for spending outside of the trade area (typically on resident trips to other more significant urban centres for shopping and recreation), market capture rates of between 70% and 75% (primary zone) and 60% to 65% (secondary zone) are likely achievable, which will yield:

- **General Merchandise sales volume**: Roughly $43 million in 2006, rising to about $46 million by 2021
- **Warranted General Merchandise floor area**: 144,000 sq. ft. in 2006, increasing to roughly 154,000 by 2021 (assuming average productivity rate of $300 per sq. ft.)
- **Supportable Floor Area "Net" of Wal-Mart**: The Whitehorse Wal-Mart, which entered the market in 2001, contains roughly 66,000 sq. ft. of floor area which can be classified as "General Merchandise". Assuming a very conservative $300 per sq. ft. sales generation for this store, total supportable floor area "net" of the Wal-Mart store is 78,000 sq. ft. in 2006 – rising to perhaps 88,000 sq. ft. by 2021.

Implications

This expected Downtown Whitehorse sales volume is enough to support the existing "General Merchandise" floor area of Wal-Mart, Real Canadian Superstore (estimated 22,000 sq. ft.), Fields, and other smaller stores (including "dollar" stores) but is not sufficient to warrant the entry of a major discount department store (and Wal-Mart competitor) such as Zellers. The most likely scenario with respect to meeting future demand is that Wal-Mart will expand its store at some point within the next 10 to 15 years.

As this is neither a large market, nor a high growth market relative to most major urban centres, no additional discount department stores such as Zellers are anticipated within the foreseeable future.

Table 6.10: Warranted Supermarket Floor Area

Table 6.10: Warranted Supermarket Floor Area

	2001	2004	2006	2011	2016	2021
Primary Trade Area (Whitehorse, City)						
Population	21,405	21,728	23,638	24,235	24,847	25,474
Avg. annual per capita spmkt expenditure		$2,807	$2,821	$2,835	$2,849	$2,863
Annual supermarket expenditure potential		$60,989,606	$66,682,798	$68,705,911	$70,788,677	$72,932,819
DT Whitehorse Market Capture (%)		80%	80%	80%	75%	75%
DT Whitehorse Market Capture ($)		$48,791,685	$53,346,238	$54,964,729	$53,091,508	$54,699,615
Secondary Trade Area (Yukon + N. B.C., less City)						
Population	8,469	8,418	8,385	8,301	8,218	8,137
Avg. annual per capita spmkt expenditure		$2,751	$2,765	$2,778	$2,792	$2,806
Annual supermarket expenditure potential		$23,157,531	$23,180,030	$23,063,047	$22,946,094	$22,829,184
DT Whitehorse Market Capture (%)		70%	70%	70%	65%	65%
DT Whitehorse Market Capture ($)		$16,210,271	$16,226,021	$16,144,133	$14,914,961	$14,838,969
Total Trade Area (Yukon + Portion of Northern BC)						
Population	29,874	30,146	32,023	32,536	33,065	33,611
Avg. annual per capita spmkt expenditure		$2,791	$2,806	$2,821	$2,835	$2,849
Annual supermarket expenditure potential		$84,147,137	$89,862,828	$91,768,958	$93,734,771	$95,762,003
DT Whitehorse Market Capture (%)		77%	77%	77%	73%	73%
DT Whitehorse Market Capture ($)		$65,001,956	$69,572,260	$71,108,861	$68,006,469	$69,538,584
Warranted Supermarket Space (Total)						
$450 per sq. ft.		144,400	154,600	158,000	151,100	154,500
$475 per sq. ft.		**136,800**	**146,500**	**149,700**	**143,200**	**146,400**
$500 per sq. ft.		130,000	139,100	142,200	136,000	139,100
Less: Existing Trade Area Supermarket Floorspace of:	164,000					
Leaves warranted additional floorspace of:		-27,200	-17,500	-14,300	-20,800	-17,600

Assumed population growth rate:
Primary Zone: 0.50%
Secondary Zone: -0.20%
Assumed expenditure growth rate: 0.65%

Sources: Statistics Canada, Retail Trade data, Yukon Bureau of Statistics, UMA market capture rates and floor area calculations.

6.7 Warranted Supermarket Floor Area

The City of Whitehorse contains a relatively large amount of supermarket space given the size of the trade area population. The difficulties some local operations are currently facing are better understood one the market's expenditure potential and likely capture rates are considered. Forecast supermarket demand and the implications regarding warranted floor area are presented in Table 6.10.

Based on realistic Downtown Whitehorse market capture rates of between 75% and 80% (primary zone) and between 65% and 70% for the secondary zone:

- **Supermarket sales volume**: Roughly $70 million throughout the study period, as additional supermarket floor area can be expected in areas other than Downtown Whitehorse which will lead to decreased capture rates beyond 2011.

- **Warranted Supermarket floor area**: This $70 million sales volume can effectively support between 145,000 and 150,000 sq. ft. of supermarket floor area at an average productivity rate of $475 per sq. ft. per year. (Most current supermarket chains seek even higher target productivity rates of $520 to $560 per sq. ft.).

- **Existing Trade Area supermarket floor area**: Within Downtown Whitehorse alone, there are 4 major supermarket/food retailers – Real Canadian Superstore (58,000 sq. ft.), Extra Foods at Qwanlin Mall (32,000 sq. ft.), SuperValu (20,000 sq. ft.), and Wal-Mart, an oft-overlooked player in this market with 14,000 sq. ft. of related floor area. Total existing supermarket floor area, including the non-Downtown supermarkets in Whitehorse, is estimated at roughly 164,000 sq. ft., as shown in Figure 5.3 – reproduced here for reference:

Supermarket Name	Supermarket-related Floor Area (Sq.ft.)
Real Canadian Superstore	45,000
Extra Foods (Qwanlin Mall)	32,000
SuperValu (Yukon Centre Plaza)	18,500
Super A Foods (Riverdale)	15,300
Super A Foods (Porter Creek)	21,800
Bigway Foods	9,600
Wal-Mart	12,000
Other Whitehorse (convenience, etc.)	10,000
Whitehorse Supermarket Total	**164,200**

Implications

It is clear that all trade area supermarket operators cannot be supported at the same desired level of per sq. ft. sales productivity. In other words, not all existing trade area supermarkets can possibly be meeting their sales targets based on realistic trade area sales potential. Based on the consumer retail survey results and on first hand observation, it appears that some stores (such as SuperValu) are finding it challenging to compete in such a well-stored market with the likes of RCS and Wal-Mart. A store closure is a very likely possibility given current demand and supply conditions.

Table 6.11 Warranted Clothing & accessories Floor Area

Table 6.11: Warranted Clothing & Accessories Floor Area

	2001	2004	2006	2011	2016	2021
Primary Trade Area (Whitehorse, City)						
Population	21,405	21,728	23,638	24,235	24,847	25,474
Avg. annual per capita spmkt expenditure		$469	$472	$474	$476	$478
Annual supermarket expenditure potential		$10,196,287	$11,157,136	$11,487,337	$11,827,101	$12,176,698
DT Whitehorse Market Capture (%)		80%	80%	80%	80%	80%
DT Whitehorse Market Capture ($)		$8,157,030	$8,925,709	$9,189,870	$9,461,681	$9,741,359
Secondary Trade Area (Yukon + N. B.C., less City)						
Population	8,469	8,418	8,385	8,301	8,218	8,137
Avg. annual per capita spmkt expenditure		$460	$463	$465	$466	$468
Annual supermarket expenditure potential		$3,871,493	$3,878,403	$3,856,044	$3,833,745	$3,811,509
DT Whitehorse Market Capture (%)		65%	65%	65%	65%	65%
DT Whitehorse Market Capture ($)		$2,516,470	$2,520,962	$2,506,428	$2,491,935	$2,477,481
Total Trade Area (Yukon + Portion of Northern BC)						
Population	29,874	30,146	32,023	32,536	33,065	33,611
Avg. annual per capita spmkt expenditure		$467	$470	$472	$474	$476
Annual supermarket expenditure potential		$14,067,780	$15,035,539	$15,343,381	$15,660,846	$15,988,207
DT Whitehorse Market Capture (%)		76%	76%	76%	76%	76%
DT Whitehorse Market Capture ($)		$10,673,500	$11,446,671	$11,696,298	$11,953,615	$12,218,840
Warranted Clothing and Accessories Space (Total)						
$280 per sq. ft.		38,100	40,900	41,800	42,700	43,600
$300 per sq. ft.		**35,600**	**38,200**	**39,000**	**39,800**	**40,700**
$320 per sq. ft.		33,400	35,800	36,600	37,400	38,200

Assumed population growth rate:
Primary Zone: 0.50%
Secondary Zone: -0.20%
Assumed expenditure growth rate: 0.65%

Sources: Statistics Canada, Retail Trade data, Yukon Bureau of Statistics, UMA market capture rates and floor area calculations.

6.8 Warranted Clothing and Accessories Floor Area

Although a detailed review of current Whitehorse clothing stores indicates a significant number of unrepresented clothing retailers, it is important to determine what amount of floor area can be realistically supported in this market given population growth and expenditure patterns. It is also important to recognize that many trade area residents tend to shop at stores in larger urban centres well outside the trade area – while on work or pleasure trips – in order to access goods that are simply not available at home. This "outflow" of trade area expenditures on clothing and accessories is most likely dominated by the major centres in Western Canada, particularly Vancouver, Victoria, Calgary, and Edmonton.

It is important also to recognize that this category does not include clothing sales from the larger "General Merchandise" stores such as Wal-Mart; it is made up of stores whose primary product line is clothing and/or accessories. Current (2006) City of Whitehorse clothing retailers include:

Women's Clothing: Maggie & Lea-Ann's Lil' Shoppe, The Wild Wardrobe, Seasons Fashions, Zoomz Women's Fashions, Sequels Consignment

Men's Clothing: The Main Man, Black & Lee

Unisex Clothing: Sandor's, Jensen's Western Store, Intersport, Sportees Activewear

Specialty: Polar Swim Shop, Shades Plus

Coast Mountain Sports, although not technically a clothing store, offers a significant selection of outdoor clothing in addition to its lines of outdoor equipment and accessories.

Based on realistic market capture rates of 80% (primary zone) and 65% (secondary zone):

- **Clothing and Accessories sales volume:** $11.4 million in 2006, rising to $12.2 million by 2021
- **Warranted Clothing store floor area:** This level of captured sales volume can support between 38,000 sq. ft. and 41,000 sq. ft. of related floor space at an assumed productivity rate of $300 per sq. ft. per year. At a lower rate of $280 per sq. ft. per year, between 41,000 and 44,000 sq. ft. is warranted in Downtown Whitehorse over the study period.

Implications

As discovered during the survey process, local residents feel that Downtown Whitehorse is lacking sufficient range in fashion and accessories, in particular affordable or discount fashions. As clothing retailers are increasingly looking to non-traditional (i.e. non-enclosed mall) store locations and models, significant growth has taken place in small-box formats of between 4,000 and 10,000 sq. ft. As noted in Appendix C (Merchandising Gaps – Box Format Retail), the list of unrepresented small box clothing chain retailers alone is between 35 and 50. Along with a wide range of potential independent stores, a handful of smaller scale fashion outlets for retailers such as Addition-Elle, Aldo, Jacob, Mexx, and The Gap could do very well in this market, particularly in either a street retail or open format shopping centre context.

It would not be surprising to see some Whitehorse market interest from such retailers over the next decade. A small number of such stores can do wonders in revitalizing an ailing shopping centre or in enhancing a street retail environment.

Table 6.12: Warranted Furniture, Home Furnishings, and Electronics Floor Area

Table 6.12: Warranted Furniture, Home Furnishings, and Electronics Floor Area

	2001	2004	2006	2011	2016	2021
Primary Trade Area (Whitehorse, City)						
Population	21,405	21,728	23,636	24,235	24,847	25,474
Avg. annual per capita spmkt expenditure		$888	$892	$896	$900	$905
Annual supermarket expenditure potential		$19,291,645	$21,085,096	$21,714,461	$22,362,165	$23,054,209
DT Whitehorse Market Capture (%)		80%	80%	80%	80%	80%
DT Whitehorse Market Capture ($)		$15,433,316	$16,868,077	$17,371,569	$17,889,732	$18,443,368
Secondary Trade Area (Yukon + N. B.C., less City)						
Population	8,469	8,418	8,385	8,301	8,218	8,137
Avg. annual per capita spmkt expenditure		$870	$874	$878	$882	$887
Annual supermarket expenditure potential		$7,324,967	$7,329,524	$7,289,062	$7,248,678	$7,216,350
DT Whitehorse Market Capture (%)		60%	60%	60%	60%	60%
DT Whitehorse Market Capture ($)		$4,394,980	$4,397,714	$4,373,437	$4,349,207	$4,329,810
Total Trade Area (Yukon + Portion of Northern BC)						
Population	29,874	30,146	32,023	32,536	33,065	33,611
Avg. annual per capita spmkt expenditure		$883	$887	$891	$896	$901
Annual supermarket expenditure potential		$26,616,612	$28,414,620	$29,003,522	$29,610,844	$30,270,560
DT Whitehorse Market Capture (%)		74%	75%	75%	75%	75%
DT Whitehorse Market Capture ($)		$19,828,297	$21,265,791	$21,745,006	$22,238,939	$22,773,178
Warranted Furniture/Furnishings/Electronics Space (Total)						
$280 per sq. ft.		70,800	75,900	77,700	79,400	81,300
$300 per sq. ft.		**66,100**	**70,900**	**72,500**	**74,100**	**75,900**
$320 per sq. ft.		62,000	66,500	68,000	69,500	71,200

Assumed population growth rate:
- Primary Zone: 0.50%
- Secondary Zone: -0.20%

Assumed expenditure growth rate: 0.65%

Sources: Statistics Canada, Retail Trade data; Yukon Bureau of Statistics; UMA market capture rates and floor area calculations.

6.9 Warranted Furniture, Home Furnishings, and Electronics Floor Area

Based on realistic market capture rates of 80% (primary zone) and 60% (secondary zone), along with previously stated assumptions on population growth and retail expenditures, the following can be surmised:

- **Furniture/Furnishings/Electronics sales volume:** $21.3 million in 2006, rising to $22.8 million by 2021 (overall 75% capture of trade area potential totalling $28.4 million in 2006 and $30.3 million in 2021)

- **Warranted Furniture/Furnishings/Electronics floor area:** Between 71,000 sq. ft. and 76,000 sq. ft. over the defined study period, assuming an average required productivity rate of $300 per sq. ft. per annum

- **Existing Whitehorse supply:** There are a significant number of relevant retailers in this category within the City of Whitehorse, including: The Brick (a recent entry), United Furniture Warehouse (North End), Easyhome (on 2nd Avenue near Shipyards Park), and Eric's Audiotronic (Downtown Core). In addition to these stores there are a number of independent custom woodworkers and manufacturers which meet customers' demand for custom furniture and furnishing solutions.

Implications

Given the recent entry of The Brick, there is not likely to be any additional opportunity for such retailers in this market. Growth is moderate, and these goods cater primarily to trade area residents rather than tourists and visitors.

The success and popularity of "General Merchandise" box retailers such as Wal-Mart and Real Canadian Superstore also serve to limit the opportunity for further growth in this category given the extent of affordable home furnishings and electronics that make up their product lines.

Table 6.13: Warranted Buildings and Home Supplies Floor Area

Table 6.13: Warranted Building and Home Supplies Floor Area

	2001	2004	2006	2011	2016	2021
Primary Trade Area (Whitehorse, City)						
Population	21,405	21,728	23,638	24,235	24,847	25,474
Avg. annual per capita spmkt expenditure		$786	$790	$794	$798	$802
Annual supermarket expenditure potential		$17,086,886	$18,674,020	$19,242,502	$19,827,787	$20,430,360
DT Whitehorse Market Capture (%)		75%	75%	73%	70%	70%
DT Whitehorse Market Capture ($)		$12,815,164	$14,005,515	$14,047,026	$13,879,451	$14,301,252
Secondary Trade Area (Yukon + N. B.C., less City)						
Population	8,469	8,418	8,385	8,301	8,218	8,137
Avg. annual per capita spmkt expenditure		$771	$774	$778	$782	$786
Annual supermarket expenditure potential		$6,487,828	$6,491,395	$6,459,280	$6,427,162	$6,395,042
DT Whitehorse Market Capture (%)		60%	60%	55%	50%	50%
DT Whitehorse Market Capture ($)		$3,892,697	$3,894,837	$3,552,604	$3,213,581	$3,197,521
Total Trade Area (Yukon + Portion of Northern BC)						
Population	29,874	30,146	32,023	32,536	33,065	33,611
Avg. annual per capita spmkt expenditure		$782	$786	$790	$794	$798
Annual supermarket expenditure potential		$23,574,714	$25,165,415	$25,701,782	$26,254,948	$26,825,402
DT Whitehorse Market Capture (%)		71%	71%	68%	65%	65%
DT Whitehorse Market Capture ($)		$16,707,861	$17,900,352	$17,599,631	$17,093,031	$17,498,773
Warranted Building and Home Supplies Space (Total)						
$280 per sq. ft.		59,700	63,900	62,900	61,000	62,500
$300 per sq. ft.		**55,700**	**59,700**	**58,700**	**57,000**	**58,300**
$320 per sq. ft.		52,200	55,900	55,000	53,400	54,700

Assumed population growth rate:
Primary Zone: 0.50%
Secondary Zone: -0.20%
Assumed expenditure growth rate: 0.65%

Sources: Statistics Canada: Retail Trade data; Yukon Bureau of Statistics; UMA market capture rates and floor area calculations.

6.10 Warranted Building and Home Supplies Floor Area

Table 6.13 examines the local market opportunity for building and home supplies stores, based on achievable market capture rates of 75% (primary zone) and 60% (secondary zone), analysis which is summarized below:

- **Building and Home Supplies sales volume:** Roughly $17 to $18 million throughout the study period, as smaller trade area centres are likely to see some expansion and/or addition to local home and hardware establishments beyond 2011

- **Warranted Building and Home Supplies floor area:** Roughly 57,000 to 60,000 sq. ft. of building and home supplies floor area over the study period

- **Current Supply:** The City of Whitehorse, and thus the trade area, is now served by a range of operations, including Erdman Building Supplies, Builders Supplyland, Kilrich Industries, and Haywire Industries. The more home consumer-oriented market is further served by the existing Canadian Tire store (soon to be replaced by a larger store format on the Argus property) and the Home Hardware Building Centre on 2nd Avenue.

Implications

The current trade area is well served by existing stores. There is simply not sufficient market size to warrant the entry of a larger industry competitor such as RONA or Home Depot, who tend to build much larger store models ranging from 60,000 to 130,000 sq. ft..

Perspective: Assuming the current market supply and demand is in a balanced state, the addition of a store of between 60,000 and 130,000 sq. ft. would require a trade area population of between 65,000 and 125,000 residents. This level of population is not likely to materialize within the foreseeable future.

Table 6.14: Warranted Drug Store/Pharmacy Floor Area

Table 6.14: Warranted Drug Store/Pharmacy Floor Area

	2001	2004	2006	2011	2016	2021
Primary Trade Area (Whitehorse, City)						
Population	21,405	21,728	23,638	24,235	24,847	25,474
Avg. annual per capita spmkt expenditure		$736	$739	$743	$747	$751
Annual supermarket expenditure potential		$15,984,506	$17,468,482	$18,006,523	$18,560,597	$19,131,173
DT Whitehorse Market Capture (%)		75%	75%	70%	70%	70%
DT Whitehorse Market Capture ($)		$11,988,380	$13,101,362	$12,604,566	$12,992,418	$13,391,821
Secondary Trade Area (Yukon + N. B.C., less City)						
Population	8,469	8,418	8,365	8,301	8,218	8,137
Avg. annual per capita spmkt expenditure		$721	$724	$728	$732	$736
Annual supermarket expenditure potential		$6,069,259	$6,072,330	$6,044,389	$6,016,403	$5,988,375
DT Whitehorse Market Capture (%)		35%	35%	30%	30%	30%
DT Whitehorse Market Capture ($)		$2,124,240	$2,125,315	$1,813,317	$1,804,921	$1,796,512
Total Trade Area (Yukon + Portion of Northern BC)						
Population	29,874	30,146	32,023	32,536	33,065	33,611
Avg. annual per capita spmkt expenditure		$732	$735	$739	$743	$747
Annual supermarket expenditure potential		$22,053,765	$23,540,812	$24,050,912	$24,577,000	$25,119,547
DT Whitehorse Market Capture (%)		64%	65%	60%	60%	60%
DT Whitehorse Market Capture ($)		$14,112,620	$15,226,677	$14,417,883	$14,797,339	$15,188,333
Warranted Drug Store/Pharmacy Space (Total)						
$400 per sq. ft.		35,300	38,100	36,000	37,000	38,000
$500 per sq. ft.		**28,200**	**30,500**	**28,800**	**29,600**	**30,400**
$600 per sq. ft.		23,500	25,400	24,000	24,700	25,300
Assumed population growth rate:						
Primary Zone:	0.50%					
Secondary Zone:	-0.20%					
Assumed expenditure growth rate:	0.65%					

Sources: Statistics Canada, Retail Trade data, Yukon Bureau of Statistics, UMA market capture rates and floor area calculations.

6.11 Warranted Drug Store/Pharmacy Floor Area

Drug stores and pharmacies are typically a highly localized use, serving mainly a surrounding neighbourhood population. They can be found in street retail districts, in larger office complexes, and in a variety of shopping centre types, from local strip malls to enclosed or open-format regional shopping centres.

Beyond the traditional pharmacy outlet, modern chain stores such as Shoppers Drug Mart offer a range of product lines, including health and wellness, beauty and cosmetics, household cleaning products, and a limited array of stationery, books, magazines, and items which can be found in a convenience-store. London Drugs goes even further than Shoppers Drug Mart in its product lines, including departments for Health/Wellness, Computers, Electronics, Cameras, Beauty, Homeware, and Food/Candy.

Based on market capture rates of 75% (primary zone) and 35% (secondary zone), the following describe the local opportunity for drug store/pharmacy floor space:

- **Drug Store/Pharmacy sales volume**: Between $14.4 million and $15.2 million to 2021
- **Warranted Drug Store/Pharmacy floor area**: Expected sales volume can support roughly 30,000 sq. ft. of floor area at an assumed average productivity rate of $500 per sq. ft. per annum
- **Current Whitehorse Supply**: Includes traditional pharmacy outlets such as the Medicine Chest Pharmacy on Lambert Street, but also two larger Shoppers Drug Mart stores – one on Main Street and one at Qwanlin Mall

Implications

Given its two local stores, Shoppers Drug Mart is in the best position to expand its operations in this market. There is not sufficient market opportunity for any additional competitors given present supply. Barring significant shifts in population growth or a reduction in supply, a larger, multi-department store such as London Drugs is deemed premature in this market, at least for the next decade.

Table 6.15: Warranted Restaurant, Caterer, and Tavern Floor Area

Table 6.15: Warranted Restaurant, Caterer, and Tavern Floor Area

	2001	2004	2006	2011	2016	2021
Primary Trade Area (Whitehorse, City)						
Population	21,405	21,728	23,638	24,235	24,847	25,474
Avg. annual per capita spmkt expenditure		$1,192	$1,198	$1,204	$1,210	$1,216
Annual supermarket expenditure potential		$25,889,535	$28,318,324	$29,178,807	$30,064,689	$30,976,706
DT Whitehorse Market Capture (%)		80%	80%	75%	75%	75%
DT Whitehorse Market Capture ($)		$20,711,628	$22,654,659	$21,884,105	$22,548,517	$23,232,529
Secondary Trade Area (Yukon + N. B.C., less City)						
Population	8,469	8,418	8,385	8,301	8,218	8,137
Avg. annual per capita spmkt expenditure		$1,168	$1,174	$1,180	$1,186	$1,192
Annual supermarket expenditure potential		$9,830,162	$9,843,912	$9,794,677	$9,745,446	$9,696,223
DT Whitehorse Market Capture (%)		50%	50%	50%	50%	50%
DT Whitehorse Market Capture ($)		$4,915,081	$4,921,956	$4,897,338	$4,872,723	$4,848,112
Total Trade Area (Yukon + Portion of Northern BC)						
Population	29,874	30,146	32,023	32,536	33,065	33,611
Avg. annual per capita spmkt expenditure		$1,185	$1,192	$1,198	$1,204	$1,210
Annual supermarket expenditure potential		$35,719,697	$38,162,236	$38,973,483	$39,810,135	$40,672,929
DT Whitehorse Market Capture (%)		72%	72%	69%	69%	69%
DT Whitehorse Market Capture ($)		$25,626,709	$27,576,615	$26,781,443	$27,421,240	$28,080,641
Warranted Restaurant/Tavern Space (Total)						
$400 per sq. ft.		64,100	68,900	67,000	68,600	70,200
$500 per sq. ft.		**51,300**	**55,200**	**53,600**	**54,800**	**56,200**
$600 per sq. ft.		42,700	46,000	44,600	45,700	46,800

Assumed population growth rate:
- Primary Zone: 0.50%
- Secondary Zone: -0.20%

Assumed expenditure growth rate: 0.65%

Sources: Statistics Canada, Retail Trade data; Yukon Bureau of Statistics; UMA market capture rates and floor area calculations.

6.12 Warranted Restaurant, Caterer, and Tavern Floor Area

Based on realistic market capture rates of 75% to 80% (primary zone) and 50% (secondary zone), the following summarizes the market opportunity for restaurant, caterer, and tavern uses is detailed in Table 6.15 and summarized below:

- **Restaurant, Caterer, and Tavern sales volume**: $27 to $28 million over the study period (to 2021)
- **Warranted Restaurant, Caterer, and Tavern floor area:** Based on an average required productivity rate of $500 per sq. ft. per year, roughly 55,000 sq. ft. of floor area is warranted throughout the study period, assuming natural growth in this category in other smaller trade area centres

Implications/Current Merchandising Gaps

Unlike for many retail categories, the extent of restaurants, taverns, and cafés in a given market can never be wholly understood through an examination of market numbers. This is in part due to the wide range in quality that naturally develops in order to meet the needs of very different target groups, including low and high income residents and tourists/visitors. While some eating and drinking establishments can survive quite well generating $350 per sq. ft. per year in sales, others (particularly chain restaurants) require much higher target rates.

In short, what is most important with respect to meeting restaurant and tavern demand is to find out what is missing from the perspective of local residents. If the right mix of restaurants is added to a given market, often expenditures will rise as a result, as the added range draws more interest from residents and visitors alike.

Based on this study's survey results, residents would like to see more of the following:

- Ethnic restaurants (Thai, Indian, Japanese, etc.)
- Fine dining restaurants (including steak house, seafood, West Coast, etc.)
- Mid-range franchise restaurants (such as Earl's, The Keg, Moxie's)
- High quality microbrewery/pub, ideally near the waterfront
- Bistro with live music, entertainment
- Ice cream/cold drink outlet on the waterfront

6.13 Summary – Retail Market Analysis

While market-generated numbers are useful tools in assessing development opportunities, they must be interpreted with care. As the forecast floor area numbers are based on acceptable industry-wide productivity rates, they indicate what level of high quality and/or new floor space can be supported in Downtown Whitehorse on a category by category basis. Many older or more marginally performing establishments continue to operate at levels considerably below these assumed productivity rates and will only be closed or replaced when supplanted with newer commercial space.

Table 6.16: Downtown Whitehorse Floor Area Quality By Sub-Area

	Floor Area Estimates		Floor Area Quality Overview		
Downtown Sub-Area	Commercial Sq. Ft.	Retail Sq. Ft.	New/Renovated /High Quality	Older/Adequate Quality	Dated/In Need Of Renovation
Old Town	43,000	5,000	20%	50%	30%
Downtown Riverfront	72,000	14,000	10%	85%	5%
Downtown South	150,000	8,000	40%	55%	5%
Downtown Commercial Core	400,000	98,000	40%	55%	5%
Downtown North	445,000	240,000	20%	50%	30%
North End Service Commercial	448,000	267,000	80%	20%	0%
Downtown Whitehorse Totals	1,558,000	632,000	44%	45%	11%

Source: UMA Downtown Inventory estimates (Dec. 2005 / Jan. 2006)

As shown in Table 6.16, of the estimated 1,558,000 sq. ft. of private sector commercial floor area in Downtown Whitehorse, about 11% (171,000 sq. ft.) is deemed to be seriously dated or in need of repairs or renovation. Applying this estimated proportion to the total retail floor area results in an estimated 70,000 sq. ft. of retail floor space which is likely ready for redevelopment today.

Downtown North

Also as outlined in Table 6.16, and which was made clear by the consultant's field work and identification of redevelopment sites, the sub-area referred to as "Downtown North" offers the most significant development and redevelopment opportunities. Of the estimated 445,000 sq. ft. of non-public sector commercial floor area in Downtown North, only 20% (roughly 90,000 sq. ft.) is deemed to be high quality space. 30% (134,000 sq. ft.) of space in this area is viewed as significantly dated, in poor condition, and thus in need of replacement or renovation.

Over the course of the next several decades, Downtown North will offer the most significant redevelopment opportunities. These are likely to include: the Qwanlin Mall property, the nearby Canadian Tire site, the now SuperValu-anchored Yukon Centre Plaza, and the Jamieson block. Appropriate, ideally mixed-use redevelopment of these sites will serve to better knit together the Downtown Commercial Core, Downtown Riverfront, and North End Service Commercial Areas. The market analysis results suggest that the most likely candidates for additional retail and related uses are clothing (particularly specialty and outlet) stores, and restaurants/taverns (particularly licensed establishments not attached to hotel uses). A new cinema complex is also likely warranted, but a mixed-use, urban-scaled development with 4 or 5 smaller theatres is deemed most appropriate to the size of the market.

7.0 Major Recommendations

There is much to commend in Downtown Whitehorse in terms of the existing land use mix and retail-commercial infrastructure, particularly given the modest size of the trade area population and the fairly slow population growth rate. The primary building blocks of this retail infrastructure (Main Street/Commercial Core and Argus/North End Service Commercial), however, are quite distinct but also geographically separated from one another, which makes pedestrian movement between the two not only difficult, but unlikely for most residents, tourists, and visitors.

Many of the answers to stimulating sustainable retail development patterns for the City of Whitehorse lie in the sub-area referred to as "Downtown North". While the Downtown Commercial Core is the social/specialty retail heart of Downtown, and the North End Service Commercial area is the auto-oriented/convenience commercial centre, Downtown North offers significant opportunities to better knit them (as well as Old Town and the Riverfront) together into a more dynamic whole. As noted in the City of Whitehorse's Downtown Plan (Figure 2), five significant potential redevelopment opportunities are evident in this area:

- **Qwanlin Mall** (underperforming enclosed shopping centre)
- **Canadian Tire** (soon-to-relocated to expanded facility at Argus property)
- **Yukon Centre** (underperforming strip retail centre)
- **South of Qwanlin Mall, east side of 3rd Street** (demolition and redevelopment opportunity)
- **Jamieson block** (Alexander Street between 3rd and 4th Streets – redevelopment)

The first four of these sites are essentially contiguous and occupy strategic locations between Old Town to the west, the North End Service Commercial area to the north, and the Downtown Riverfront's "Motorways" property to the east. Given the relatively slow trade area population growth and the extent of current retail-commercial supply, a mixed-use residential and commercial approach to redeveloping these properties is likely to be most realistic and sustainable in this market.

The Jamieson block is also strategically located roughly midway between the Downtown Commercial Core and the North End. Currently occupied by a number of significantly deteriorated structures, this site offers an important opportunity to create a small commercial node which could potentially serve the lifestyle needs of Old Town residents while providing a convenient rest stop for residents and visitors willing to move on foot between Main Street and the Qwanlin Mall area.

These redevelopment opportunities offer significant potential to better integrate the various areas of Downtown.

Based on the consultant's field work, stakeholder and public consultation, the Downtown commercial inventory, and the results of the category-specific demand assessments, the following actions are highly recommended in order to stimulate market interest, build on what is already in place, and ultimately contribute to more dynamic and integrated Downtown commercial and related social activities:

1. **Require Retail Market Impact Studies**: Given the modest trade area growth rates and the desire to support and build on existing retail-commercial areas, the City of Whitehorse, through its Planning & Development Services Department, should require developers to prepare market impact studies as part of the development approvals process. This requirement should likely apply to commercial developments over a certain threshold size – ideally 1,860 m^2 or roughly 20,000 sq. ft., in order to ensure that:

   - The development concept fits with goals outlined in the Downtown Plan and in the Downtown Retail Strategy, for both Downtown as a whole and for specific sub-areas
   - There is sufficient and demonstrated market support for the planned land use components (market demand in terms of dollars and warranted floor area)
   - Planned commercial development components will not negatively impact the continued successful operations of existing commercial areas – demonstrate likely impact on sales/performance of existing commercial areas such as Main Street

2. **Establish Downtown Whitehorse Business Improvement Area**: The City of Whitehorse, in partnership with the Yukon Government should pursue enabling legislation at the Territory level to allow for the creation of a Downtown Whitehorse BIA and associated business levies that would support a range of desired activities, including:

   - Marketing and promotion (including creation/management of Downtown Whitehorse web site)
   - Downtown event programming (including pedestrian-only events along Main Street)
   - Cleanliness and maintenance (graffiti, sidewalk clearing, tree maintenance, etc.)
   - Streetscape improvements, furniture
   - Advocating for resolution of Downtown issues (social, safety, etc.)

   This recommendation should be referred to the Municipal Act Review Committee as there are currently no provisions in the Municipal Act for the creation of a BIA. Given that many Downtown Whitehorse businesses are smaller independent operations, a partnership model is highly recommended which would see the City of Whitehorse, the Yukon Government, and BIA members sharing responsibility for funding desired activities.

   The existing Main Street Yukon Society will serve as an excellent base for creation of this BIA. For purposes of continuity and ease of understanding, an organization name such as "Main Street Yukon BIA" should be seriously considered. This will prevent confusion and allow a more seamless transition.

3. **Develop Downtown Whitehorse web site:** As noted in Section 5.3 of this report, creation and regular updating of a high quality Downtown Whitehorse web site is highly recommended. Of primary importance is the site's ability and potential to provide information crucial to the decisions of target groups vital to the City and the Yukon's economic development goals, namely:

   - *Tourists and visitors*: information on local attractions, events, seasonal and year-round accommodations, shopping and services, vehicle and equipment rentals
   - *Local residents*: event calendar, opportunities for participation, planned projects
   - *Prospective residents and employees*: local realtor contacts and recommendations, basic but current real estate market information, job listings
   - *Prospective business operators*: licensing requirements, business resources and services, local/regional commercial market information and trends
   - *Existing business operators:* information and advice from local real estate professionals on opportunities for expansion, relocation, even lease terms
   - *Prospective land developers/property owners/investors*: information on development and redevelopment sites, commercial and residential rental properties, links to relevant municipal planning and development policies, relevant market trends and potential opportunities identified through the Downtown Plan and Downtown Retail Strategy processes
   - *Out-of-town shoppers*: Information on web-based shopping opportunities and product lines

   Maintenance and upgrading of such a site could very well justify a full-time position for a future BIA employee.

4. **Revise Liquor Laws**: Discussion needs to be initiated at the City and Yukon Government levels in order to begin addressing the need for revising current liquor legislation, as mentioned often during the Downtown Plan public and stakeholder consultation process. Restricting liquor sales to establishments attached to hotels severely and unnecessarily limits the potential to allow for new and interesting nightlife, including pubs/microbreweries, cabarets, and bistros.

5. **Actively Pursue Redevelopment**: Rather than waiting for private sector developer and property owner interest in generating worthwhile project opportunities that will contribute to the goals identified in both the Downtown Plan and Downtown Retail Strategy, it is possible to stimulate such interest by tabling preliminary development concepts. Such interest can be stirred through fairly straightforward and cost-effective marketing materials which would be forwarded to relevant property owners and which would include information on

   - Current market and development trends which would support redevelopment
   - Current Planning initiatives and relevant policy changes (i.e. mixed use, height limits, etc.)
   - Market/development opportunities identified in both the Downtown Plan and Downtown Retail Strategy
   - Public opinion
   - Examples of successful projects with desired/supportable land use mixes

This level of strategic marketing activity could very effectively be undertaken through the partnering of the Yukon Government's Economic Development, the City of Whitehorse, local realtors, and the existing Yukon Main Street Society.

6. **Establish Commercial Design Guidelines**: In order to minimize the "parking wasteland" effects of many box-oriented commercial or strip-format shopping complexes, the City of Whitehorse, through its Planning & Development Services Department, should implement design guidelines which would ensure:

   - That buildings make some attempt to "communicate" with the surrounding landscape and other local uses, through use of certain quality design materials, avoidance of large blank walls, inclusion of sufficient weather protection, pedestrian walkways, etc.

   - Edge of site treatments, using landscaping and possibly street furniture, which better integrate such developments visually and functionally with surrounding uses

   - On-site landscaping and lighting for improved safety and aesthetic appeal

The following actions are also highly recommended as means of generating sustainable retail-commercial development in Downtown Whitehorse:

- Find a way to make an appropriately scaled Arts and Heritage Village project a reality – in a suitable location and at a supportable scale. The arts and culture elements of a community are an essential means of generating activity and interest in a given area and, along with residential uses, contribute directly to the success of related/surrounding commercial operations

- Initiate discussion with a movie theatre company on the possibility of developing a more appropriately scaled, and ideally, mixed-use urban theatre complex of perhaps 4 or 5 smaller cinemas, rather than a big-box-oriented design which is not deemed to be supportable in this market

- As recommended in the Downtown Plan, establish a Downtown Housing Committee to actively encourage residential development and monitor progress

- Locate community and regional-serving commercial or entertainment uses in the Downtown area wherever possible; the development of new highway-oriented commercial nodes should be avoided, as these have proven detrimental to Downtown uses in many other municipalities

- Rename 1st Street "Front Street" as a way of bringing a more authentic sense of history to everyday activity and encouraging reconnection to the now underused waterfront area

Appendix A
Retailer & Service Provider Survey

Plan your

DOWNTOWN
WHITEHORSE

Retailer and Service Provider Survey

UMA is surveying Downtown retailers and service providers as part of the larger Downtown Plan process in order to gain insight into issues of concern and areas of opportunity. You can be assured that individual answers will be kept entirely confidential. These will only be summarized and assessed in the context of preparing a retail strategy for Downtown Whitehorse. The strategy report will be completed and submitted to the City in early 2006.

Please take a few minutes to answer these questions relating to your business operations in Downtown Whitehorse. We wish you great success in the years to come and very much appreciate your input.

1. **Name and Address of Business:**

_____

_____

2. **Name of owner or manager and contact phone number:**

_____

_____

3. **Please describe your primary category of products or services:**

_____

4. **Which best describes your downtown store:**

☐ Independent/unique ☐ Other: _____

☐ Part of a chain or franchise?

5. **Do You:** ☐ Own? - *or* - ☐ Lease / Rent?

6. **If Lease / Rent, please indicate roughly when your lease expires:**

☐ Within the next 12 Months ☐ Within the next 2 to 3 years

☐ Within the next 1 to 2 years ☐ Other: _____

7. **Amount of floor area?** Approximately _____ sq. ft.

8. **Number of employees:** _____ Full-Time _____ Part-Time

9. Weekly Business Hours:

Monday to Friday: _____ Sundays & Holidays: _____

Saturday: _____

10. How long have you been operating in your current downtown location?

- ☐ Less than one year
- ☐ 1 to 2 years
- ☐ 2 to 5 years
- ☐ 5 to 10 years
- ☐ 10 to 20 years
- ☐ More than 20 years

11. Which of the following best describes your primary customer base?

- ☐ Mainly Downtown Residents
- ☐ All Whitehorse Residents
- ☐ Mainly Tourists and Visitors
- ☐ Other: _____

12. How is business (monthly revenue) compared to:

1 year ago?	☐ Better	☐ Same	☐ Worse
5 years ago?	☐ Better	☐ Same	☐ Worse

13. Which of the following best describes your plans over the next five years:

- ☐ Remain in present location, only minor renovations planned
- ☐ Remain in present location, major renovations planned
- ☐ Relocate but remain downtown
- ☐ Relocate outside of downtown
- ☐ Other: _____

14. What are the top three strengths of your downtown location?

1. _____
2. _____
3. _____

15. What are the top three weaknesses of your downtown location?

1. _____
2. _____
3. _____

16. What area of the City represents your greatest competition?

_____

17. Rate the importance of the following factors in terms of improving your downtown business:
(0 = not important, 10 = extremely important)

Increased downtown residential population: _____ / 10

More offices, daytime employment: _____ / 10

Better downtown cleanliness and maintenance: _____ / 10

Increased tourist/visitor volumes: _____ / 10

More entertainment, events, programming: _____ / 10

Superior downtown marketing efforts: _____ / 10

18. Rate the importance of more of the following types of establishments for improving downtown as a whole: (0 = not important, 10 = extremely important)

Licensed restaurants, pubs, bistros, cabarets: _____ / 10

Art galleries and cultural establishments: _____ / 10

Specialty clothing stores: _____ / 10

Household furnishings/furniture stores: _____ / 10

Fresh/gourmet/health food store: _____ / 10

19. Name 3 high priority additions (business types) for improving downtown as a whole *(not listed in 18)*:

1. _____
2. _____
3. _____

*The next three questions relate to **parking** issues:*

20. Where do your employees tend to park when they come to work?

_____

_____

_____

21. We hear customer complaints about lack of parking:

☐ Never ☐ Sometimes ☐ Very Often / Daily

☐ Rarely ☐ Fairly Often

20. **Please provide your thoughts and ideas for improving downtown parking:**

_____

_____

_____

_____

_____

_____

Please feel free to provide additional comments on issues of importance to you as a Downtown Whitehorse merchant or service provider:

_____

_____

_____

_____

_____

_____

_____

_____

Where to Return your Retailer and Service Provider Survey

It is important that we hear from you about doing business in Downtown Whitehorse.
Please return surveys to:

In Person: City Hall
2121 2nd Avenue

Planning & Development Services Department
4210 4th Avenue

By Mail: City of Whitehorse
2121 2nd Avenue
Whitehorse, Yukon
Y1A 1C2

By Fax: 867-668-8395

For more information please contact Zoë Morrison at 867-668-8338 or by email at zoe.morrison@city.whitehorse.yk.ca.

Appendix B
Consumer Survey

Plan your

DOWNTOWN
WHITEHORSE

Downtown Consumer Retail Survey

UMA is surveying Downtown Whitehorse shoppers on their shopping habits, opinions as to what's missing, and thoughts on parking as part of the larger Downtown Plan process.

Please take a few minutes to answer this one-page questionnaire.

1. **Where do you live?**

   Downtown [ ] Other area of Whitehorse [ ] Other area of Yukon [ ]

2. **How many times in a typical month do you visit the following supermarkets?**

   Real Canadian Superstore: _____ Super A (Riverdale): _____

   Extra Foods: _____ Super A (Porter Creek): _____

   Bigway Foods: _____ SuperValu: _____

3. **If you could add three new stores, shops, restaurants, or other business Downtown, what would they be? (Please feel free to name either a type of establishment or a specific establishment name.)**

   _____

   _____

   _____

4. **Name 3 reasons you don't shop, dine, or seek entertainment Downtown more often:**

   _____

   _____

   _____

5. **How often would you say parking Downtown is a serious problem/hassle for you?**

   Never/Rarely [ ] Sometimes/Once in a while [ ] Often [ ]

6. **What would you do to improve the Downtown parking situation for consumers/shoppers?**

   _____

   _____

Appendix C
Merchandising Gaps
Box Format Retail

COMPENDIUM OF LARGE/BOX RETAILERS IN CANADA

Illustrative list of large retailers, *generally* over 4,000 sq. ft., operating in Canada
(Not inclusive of all retailers that can be classified as big-boxes/category killers)

CATEGORY	Typical Sizes (Sq. Ft.)	(As of 2005/06) In Whitehorse? (blank for No)
Home Improvement/Hardware		
Association Cooperative Normandin	9,800 (SC)	
Canadian Tire	**15,000 (FR)**	**Yes**
Cashway Building Centres	FR	
Cloverdale Paint	2,000 (FR), 3,500(SP), IN	
Co-op Building Centre	FR, SP	
Co-op Home Centres	250,000 (FR)	
Co-op Stores	2,500 (FR)	
Copp's Buildall	15,000 (FR)	
Eddy	10,000 (FR)	
Glidden Paint	4,000 (FR), 3,000(SP)	
Home Depot	116,000 (PC)	
Home Hardware	**FR, SC, SP**	**Yes**
Kent Building Supplies	45,000 (FR), SP	
OK Builders Supplies	8,000 (FR)	
Pal	7,000 (FR)	
Peavey Mart	13,000 (FR), 11,000 (SP)	
Potvin & Bouchard	30,000 (FR), 60,000 (OT)	
Revelstoke Home Centre	FR	
Revy Home & Garden	FR, 60,000 to 100,000	
Robinson Lighting and Bath	6,000 (FR), MM, PC, SP	
Ro-Na Hardware	n/a	
Ro-Na Home Centre	n/a	
Schurman Building Supply	8,000 (FR)	
Tim-BR-Mart	4,000 (FR)	
Totem Building Supplies	16,000 (FR), 25,000(SC)	
TSC Stores	15,000 (FR)	
Windsor Plywood	8,000 (FR)	
Office Supplies		
Addmore Office Furniture	6,000 (FR)	
Business Depot/Staples	FR,PC,SC,SP	
Grand & Toy	3,000 (FR); 3,000 (SC); (3,000) SP	
Kinkos	FR	
Office Depot	28,000 (FR); 30,000 (PC); 30,000 (SC); SP	
Office Max	**	
Staples	**20 to 30,000 (FR, SC)**	**Yes**
The Office Place	28,000 (FR); 30,000 (PC); 30,000 (SC); SP	
Computers/Electronics		
A&B Sound	FR, SC	
Beatties	4,500 (FR); SP	
Certified Radio	20,000 (FR)	
Circuit City (mainly US)	n/a	
Commercial Electronics	16,000 (FR)	
CompuSmart	FR	
Future Shop	18,000 (FR); 13,000(MM); 23,000 (PC); 23,000 (SC); 18,000 (SP)	
London Drugs	FR, SC, SP	
MicroAge	3,500 (OF)	
The Sony Store	1,800 (SC); 2,000 (SP)	
Visions	FR; SC	

COMPENDIUM OF LARGE/BOX RETAILERS IN CANADA

Illustrative list of large retailers, *generally* over 4,000 sq. ft., operating in Canada
(Not inclusive of all retailers that can be classified as big-boxes/category killers)

CATEGORY	Typical Sizes (Sq. Ft.)	(As of 2005/06) In Whitehorse? (blank for No)
WestWorld Computers	15,000 (FR); 900 (SP)	
Furniture, Furnishings		
Arrow Furniture	30,000 (FR); SP	
Art & Home	2,000 (FR); SC	
Bad Boy Furniture	30,000 (FR)	
Brault & Martineau	40,000 (FR); SC	
Caban	14,000 (FR); SC	
Crate and Barrel	n/a	
Daniadown Quilts	700 (FR); 10,100 SC	
De Boer's Furniture	n/a	
Ethan Allen	FR; SC	
Frame Craft	**	
The Home Company	SC	
Idomo Furniture Company	80,000 (FR)	
IKEA	230,000 (FR); SC	
Kitchen Sense	SC	
Kitchen Stuff Plus	4,000 (FR); 12,000 (PC)	
La-Z-Boy Furniture Gallery	15,000 (FR)	
Ming Wo	1,500 (FR); 1,300 (SC)	
Nothin Fancy	FR; SC	
Paramount Furniture	60,000 (FR)	
Pier 1 Imports	8000 (FR); SP	
Quilts, Etc	SC	
Randall's Paints	26,000 (FR); 6,000 (IN); 7,000 (SP)	
Schwartz Furniture Warehouse	9,000 (OF); 4,500 SC	
Sears Furniture & Appliances	35,000 (FR); 35,000 (PC)	
Select Art Galleries	1,000 (FR)	
Sescolite Lighting Centre	15,000 (FR)	
Sleep Country (Canada)	PC; SP	
The Brick	**FR; PC; SP; SC**	**Yes (soon)**
The Chesterfield Shop	6,000 (FR)	
United Furniture Warehouse	FR; SC	
The Urban Barn	SC; SP	
Value Plus Furniture	5,000 (SC)	
WorldWide Furniture	100,000 (FR)	
Wosk's	30,000 (FR)	
Zip International	**	
Carpets		
Burrit Brothers Carpets	**	
Dream Carpets	**	
End of the Roll	**	
Jordan's Carpets	4,000 (FR); 3,500 (SC); 5,000 (SP)	
United Carpets	**	
Video Rental		
Blockbuster Video	5,735 (FR); 5,735 (SC); 5,735 (SP)	
Gone Hollywood Video	1,000 (FR); 1,000 (SC); 1,000 (SP)	
Jumbo Video	5,000 (FR); SC; SP	
Rogers Video/Mega Movies	SP	
Video Update	**FR; SC; SP**	**Yes**

COMPENDIUM OF LARGE/BOX RETAILERS IN CANADA

Illustrative list of large retailers, *generally* over 4,000 sq. ft., operating in Canada
(Not inclusive of all retailers that can be classified as big-boxes/category killers)

CATEGORY	Typical Sizes (Sq. Ft.)	(As of 2005/06) In Whitehorse? (blank for No)
Toys		
FAO Schwarz	25,000 + (FR)	
Toys 'R Us	32,000 (FR,SC); 32,000 (SP)	
Kirouac	1,500 (SC)	
Clothing		
A. Gold & Sons	**	
Addition-Elle	2,000 (FR); 1,400 (SC)	
Athlete's World	FR; 3,500 (SC)	
Bargain Giant	SC	
Bovet	DS, FR, SC	
Club Monaco	3,500 (FR); 584 (SC)	
Columbia Sportswear	**	
Danier Leather	4,000 (FR); 4,000 (PC); 1,000 (SC)	
Esprit	1,700 (DS, SC)	
Freed's of Windsor	20,000 (FR)	
George Richards	4,000 (FR); 4,000 (PC); 3,000 (SC); 4,000 (SP)	
Gigi	**	
Goodwill Retail Stores	1,000 (FR); SP	
Guess?	3,000 (FR); 3,000 (SC)	
Hangers Fashion	FR; SC	
Harry Rosen	19,300 (FR); 9,000 (SC)	
Holt Renfrew	FR; OF; SC	
Jacob	FR; SC	
Kids World	**	
Le Chateau	4,000 - 6,000 FR*	
Leone	20,000 (SC)	
Lingerie & Co.	**	
Lingerie Silhouette	900 (SC)	
Mark's Work Wearhouse	**FR; OF; 10,000 (PC, SC, SP)**	**Yes**
Menswear Company	n/a	
Mexx	FR; PC; SC	
Moores, The Suit People	3,700 (FR); PC; SC; SP	
Mr. Big 'N Tall	FR; SC; 5,000(SP)	
Old Navy	PC; SC	
Penningtons	9,000 (SP)	
Red Apple Clearance Centre	9,500 (FR, SC, SP)	
Reitmans	**3,500 (SC)**	**Yes**
Roots	800 (SC)	
Saan	12,000 (FR); 21,000 (SC); 13,500 (SP)	
Smart Set	2,100 (SC)	
The Gap	5,000 (FR, SC)	
The Suit Exchange	PC; SP	
Tristan	FR, SC	
Urban Outfitters	n/a	
Winners	16,000 (FR); 25,000 (PC); 25,000 (SC); 16,000 (SP)	
Arts and Crafts/Fabric		
Bouclair	10,000 (FR); 10,000 (SC); 10,000 (SP)	
Chintz and Co. Decorative Furnishings	4,000 (FR)	
Crafter's Marketplace	4,000 (SC); 7,000 (SP)	
Crafts Canada	FR	

COMPENDIUM OF LARGE/BOX RETAILERS IN CANADA

Illustrative list of large retailers, *generally* over 4,000 sq. ft., operating in Canada
(Not inclusive of all retailers that can be classified as big-boxes/category killers)

CATEGORY	Typical Sizes (Sq. Ft.)	(As of 2005/06) In Whitehorse? (blank for No)
Crafts 'N More	FR, SC	
Fabric Land	10,000 (FR); 10,000 (SC)	
Lewiscraft	SC	
Michael's	226,500 (PC); 40,000 (SC); 60,000 (SP)	
Florist/Nursery		
Garden Works	12,000 (FR)	
Botanix	20,000 (FR)	
White Rose Home & Garden Centres	9,200 (FR); 22,000 (SP)	
Art Knapp Nurseries	10,000 + (FR)	
Footwear		
Aldo Outlet Store	1,000 (FR); 1,000 (SC)	
Globo Shoes	11,000 (SP); PC	
Payless Shoe Source	2,800 (FR, SC, SP)	
Shoe Warehouse	FR; SC	
The Shoe Company	2,700 (FR); 3,000 (PC); 2,400 (SC)	
Transit Shoes	2,385 (FR); 1,000 (SC)	
Yellow Mega	8,000 (FR); 8,000 (SC)	
Theme Stores		
The Disney Store	SC	
Warner Brothers	U.S.	
World of Animation	**	
Sporting Goods		
Bug 5 Sporting Goods	**	
Fitness Depot	7,000 (IN)	
Coast Mountain Sports	**7,000 to 25,000 (FR, SC)**	**Yes**
Golf Town	21,000 (PC)	
Mountain Equipment Co-op	20,000 (FR)	
National Sports Centre	15,000 (SP); FR,SC	
Nevada Bob's Golf Centres	FR, SC, SP	
Sport Chek	20,000 (FR); 20,000 (SC)	
Sport Mart	7,000 (FR,SP, SC)	
Team Sports	10,000 (FR)	
General/DSTM		
Army and Navy Department Store	25,000 (FR)	
Bargain Shop	FR; SC	
Bay, The	140,000 (FR,SC)	
Block-Buster Liquidation World	20,000 (FR, SC)	
Co-op Shediac	32,000 (FR)	
Fields Department Store	**FR; SC; SP**	**Yes**
Hart	23,000 (SC)	
Hills	10,000 (FR)	
Honest Ed's	160,000 (FR)	
Liquidation World	12,000 (FR, MM); 8,000 (SP)	
Montrex	50,000 (OF)	
Pioneer Co-op	2,500 (FR); 4,000 (SC)	
Riff's	10,000 (FR)	
Ro-Na Warehouse	120,000 (FR,PC); 130,000 (SC)	

COMPENDIUM OF LARGE/BOX RETAILERS IN CANADA

Illustrative list of large retailers, *generally* over 4,000 sq. ft., operating in Canada
(Not inclusive of all retailers that can be classified as big-boxes/category killers)

CATEGORY	Typical Sizes (Sq. Ft.)	(As of 2005/06) In Whitehorse? (blank for No)
Rossy	10,000 (FR); 25,000 (SC); 17,000 (SP)	
Sears	FR, SC	
The Bargain! Shop	FR, SC	
Wal-Mart	**FR; SC; SP, 110,000 to 160,000 (80,000 in WH)**	**Yes**
Zellers	90,000 (FR); 77,500 (SC); SP	
Food/Supermarket		
Capers	FR, est. 20,000 to 25,000	
Co-op Food Store	30,000 (SC)	
Extra Foods	**20,000 (FR)**	**Yes**
Food-For-Less (Safeway Superstore)	FR, PC 50,000	
Foodland	FR	
Garden Market IGA	FR, SC; SP, 34,000 to 43,000	
Knetchel	5,000 (FR); SC; SP	
L & M Foodmarket	12,000 (SC); SP	
Maxi	35,000 (SC); 35,418 (SP)	
McDaniel's Y.I.G.	**	
Metro	5,000 (FR); SC; SP	
New Asia Food Centre	**	
No Frills	7,800 (FR, SC)	
Overwaitea	10,280 (SC)	
Price Check Foods	5,000 (SP)	
Price Costco	135,000 (FR)	
Provigo	5,860 (FR); 5,700 (MM); 4,700 (OF); 8,900 (SC); 7,700 (SP)	
Real Canadian Superstore	**86,000 (FR); 47,800 (SC); 32,000 (SP)**	**Yes**
Safeway	40,000 to 60,000 (FR, SC, SP)	
Save-On-Foods	45,413 (SC)	
Shop Easy	OT	
Super C	FR	
Super Valu	5,000 (FR, SC); SP	
T + T Supermarket	20,000 (FR)	
The Barn Fruit Markets	SC	
Thrifty Foods	25,000 (FR); 80,000 (OF); 12,000 (SC); 16,000 (SP)	
Triple S	**	
Valu-Mart	15,000 (FR)	
Your Independent Grocer	15,000 (FR)	
Zehrs Markets	40,000 (FR, SC); SP	
Records and Tapes		
A & B Sound	FR, SC, est. 6,000 to 12,000	
Future Shop	18,000 (FR); 13,000(MM); 23,000 (PC); 23,000 (SC); 18,000 (SP)	
HMV	6,000 (FR); 1,000 (SC); 4,000 (SP)	
Sam The Record Man	1,000 (FR); SC	
Virgin Records	FR est. 20,000	
Books		
B. Daulton Booksellers	n/a	
Coles	**3,000 to 5,000 (SC, SP)**	**Yes**
Book Warehouse	SP, est. 4,000 to 5,000	

COMPENDIUM OF LARGE/BOX RETAILERS IN CANADA

Illustrative list of large retailers, *generally* over 4,000 sq. ft., operating in Canada
(Not inclusive of all retailers that can be classified as big-boxes/category killers)

CATEGORY	Typical Sizes (Sq. Ft.)	(As of 2005/06) In Whitehorse? (blank for No)
Chapters/Indigo	FR, PC 16,000 to 24,000	
The Book Company	n/a	
Coffee		
Blenz	FR; MM; OF; SC; SP	
Coffee Time	1,800 (FR); 2,000 (IN); 900 (OF); 400 (OT); 500 (SC); 1,000 (SP); TR; UC	
Grabbajabba	900 (FR); 350 (SC); 970 (SP); OF; UC	
Roastmastirs	est. 2,000	
Seattle's Best Coffee	est. 3,000 SP	
Second Cup	650 (FR); 400 (MM); 400 (OF); OT; SC	
Starbucks	**800 (FR); 800 (MM); 850 (OT); 200 (SC); 1,400 (SP); HS; PC**	**Yes**
Tim Horton's	**1,000 to 2,500 (FR)**	**Yes**
Timothy's World Coffee	800 (FR); 800 (OF); 300 (MM); 500 (RE); 350 (SC); 1,000 (SP); 500 (TR)	
Pet Stores		
Aqua-Tropical	6,000 (SP)	
Bosley's Pet Food Mart	FR, SC	
P J 's Pet Centre	1,136 (SC); SP	
Pet Habitat	1,500 (SC)	
Petcetera	SC; SP	
Petland	12,000 (FR); 16,000 (PC); 1,600 (SC); 5,000 (SP)	
PetSmart	FR; SP	
Super Pet	11,386 (PC)	
Drug/Health and Beauty		
Herbie's	SP	
Shoppers Drug Mart	**6,000 to 10,000 (SC, SP)**	**Yes (2)**
Super Drug Mart	4,000 (FR); 7,500 (SC); 4,000 (SP)	
Town & Country Guardian Drugs	7,500 (FR)	
Uniprix	5,800 (FR, SP, SC)	
Value Drug Mart	4,000 (FR, SC, SP)	
Miscellaneous		
Ashbrooks (Housewares)	**	
Auto Point (Automotive)	**	
Bakery Outlet Plus (Specialty Food)	3,000 (FR); SC	
Brown's Cleaners (Dry Cleaners)	600 (FR); 500 (SC); 500 (SP)	
Canadian Tire (Automotive, Home)	**15,000 (FR)**	**Yes**
Daniadown Quilts (Housewares)	700 (FR); 10,100 (SC)	
Dark Zone (Entertainment)	n/a	
Dollarama (Variety)	5,000 (FR); 5,000 (SC); 5,000 (SP)	
Everything for a Dollar Store (Variety)	2,500 (SC); SP	
Lens & Shutter Cameras (Photo)	13,500 (FR); 1,500 (SC)	
Munro Farm Supplies (Specialty)	10,000 (FR)	
Party City (Specialty)	10,000 (SP); FR; PC	
Rob McIntosh China and Crystal	FR, SC	
Ruckers Fun Centres (Entertainment)	2,500 (FR); 1,800(SP)	
Sharper Image	SC	
Super Fitness Centre (Fitness)	FR	

COMPENDIUM OF LARGE/BOX RETAILERS IN CANADA

Illustrative list of large retailers, *generally* over 4,000 sq. ft., operating in Canada
(Not inclusive of all retailers that can be classified as big-boxes/category killers)

CATEGORY	Typical Sizes (Sq. Ft.)	(As of 2005/06) In Whitehorse? (blank for No)
Bombay Company (Fine Gifts)	3,000 (SC); FR	
The Rubbery	**	

Sources:

Directory of Retail Chains in Canada. Rogers Media
UMA field work (Oct. to Dec. 2005)

CODING LEGEND:

FR: freestanding/streetfront	IN: industrial
PC: power centre	OF: office/commercial
SC: shopping centre	MM:multi/mixed use complex
SP: strip plaza	UC: university/college
* Estimate	
** Unknown	

Appendix D
Canadian Downtown Website Review

DOWNTOWN WEBSITE REVIEW

MAJOR CANADIAN CITIES (Including BIA, BIZ, and BID Organizations)

Downtown Website	Visual Appeal[1]	Intuitive Site Navigation[2]	Photographic Content[3]	Market/Business Development Information[4]	Retail Shopping Information[5]	Event Information[6]	Tourist, Visitor Orientation[7]	External Links[8]	News and Archives[9]	Real Estate, Leasing Information?[10]	Site Search Engine?[11]	Top 3 Results in Google Seach (Downtown ___)[12]	Website Score (%)[13]	Rank
www.downtowncalgary.com	7.5	9.0	8.0	9.0	8.0	9.5	9.0	7.5	8.5	No	No	Yes	81%	1
www.downtownvancouver.net	8.5	8.5	8.0	8.0	8.0	9.0	7.5	8.0	8.0	No	No	Yes	79%	2
www.reginadowntown.ca	8.0	8.5	7.0	8.0	8.5	6.0	8.0	8.0	9.0	No	No	Yes	76%	3
www.downtownwinnipegbiz.com	7.5	7.5	2.0	7.5	8.0	8.5	9.0	7.0	8.0	No	Yes	Yes	75%	4
www.nanaimodowntown.com	7.0	8.0	2.0	4.0	9.0	9.0	8.0	8.5	8.0	Yes	No	Yes	74%	5
www.downtownkelowna.com	7.0	7.0	6.5	7.5	6.0	7.0	7.5	6.0	8.5	Yes	No	Yes	73%	6
www.downtownoshawa.ca	7.0	7.5	6.0	5.0	9.0	5.0	3.0	7.0	7.5	Yes	Yes	Yes	72%	7
www.downtownvernon.org	6.5	7.0	8.0	7.0	8.5	7.0	6.5	7.5	6.5	No	No	Yes	70%	8
www.downtownsaskatoon.com	7.0	8.0	5.0	8.5	4.0	8.0	7.5	7.5	3.0	Yes	No	Yes	69%	9
www.downtownpg.com	5.0	7.5	6.0	5.0	6.0	7.0	5.0	6.0	7.0	Yes	No	Yes	65%	10
www.kcbia.com	6.5	6.0	3.0	3.0	7.5	6.5	7.0	6.5	7.5	No	No	Yes	59%	11
www.mainstreetlondon.ca	8.0	8.0	3.0	2.0	8.5	3.0	5.0	5.0	5.0	Yes	No	Yes	58%	12
www.duncandowntown.com	4.0	6.0	6.0	2.0	7.5	7.0	8.0	3.0	4.0	Yes	No	Yes	58%	13
www.experiencedowntownreddeer.com	7.0	6.5	6.5	4.0	3.0	6.0	6.0	5.0	3.0	Yes	No	Yes	57%	14
www.downtownbrandon.com	6.5	7.0	7.0	2.0	8.0	3.0	4.0	7.0	4.0	No	No	Yes	54%	15
www.downtownhamilton.com	5.0	6.0	4.0	2.0	5.0	2.0	3.0	2.0	3.0	Yes	No	Yes	42%	16
Lloydminster - www.streetscapes.ca	4.0	6.0	3.0	2.0	6.0	2.0	2.0	4.0	3.0	No	No	Yes	37%	17

Source UMA ratings, based on website reviews conducted in September, 2005.

Notes

[1] Aesthetic appeal of page design, graphics, layout, active content.

[2] Web site structure and layout of links allow for easy navigation.

[3] Quantity and quality of photographic material throughout the site.

[4] Information on local market demographics, population, market size, employment – info useful for prospective businesses, investors, or residents.

[5] Quality and extent of information on local shopping and service establishments.

[6] Quality and extent of information on local events, schedules.

[7] Quality and extent of information facilitating the tourist/visitor experience, including maps, information and advice on accommodations, etc.

[8] Extent and relevance of links to external websites.

[9] Access to historical and current newsletters, local news, current and upcoming projects, etc.

[10] Offers on-site information on commercial leasing and sale opportunities, residential property information – + 5%, otherwise 0.

[11] Site offers a search function (not limited to one category – site-wide search capability) – + 5%, otherwise 0.

[12] Google search of "Downtown + [City Name]" turns up the downtown website in the top 3 results – + 5%, otherwise 0.

[13] Overall website score based on maximum of 100%.

Adjusted Rank	Unadjusted Rank		Unadjsuted Score	2001 Population	Score per 1,000 Population	Adjusted Score
1	**5**	**www.nanaimodowntown.com**	**73.5**	**73,000**	**1.007**	**79.5**
2	**8**	**www.downtownvernon.org**	**69.5**	**33,494**	**2.075**	**78.5**
3	**6**	**www.downtownkelowna.com**	**73.0**	**96,288**	**0.758**	**76.0**
4	**3**	**www.reginadowntown.ca**	**76.0**	**178,225**	**0.426**	**76.0**
5	**1**	**www.downtowncalgary.com**	**81.0**	**878,866**	**0.092**	**76.0**
6	2	www.downtownvancouver.net	78.5	545,671	0.144	75.5
7	7	www.downtownoshawa.ca	72.0	139,051	0.518	73.0
8	4	www.downtownwinnipegbiz.com	75.0	619,544	0.121	71.0
9	10	www.downtownpg.com	64.5	72,406	0.891	69.5
10	12	www.duncandowntown.com	57.5	4,699	12.237	67.5
11	9	www.downtownsaskatoon.com	68.5	196,811	0.348	67.5
12	14	www.experiencereddeer.com	57.0	67,707	0.842	61.0
13	15	www.downtownbrandon.com	53.5	39,716	1.347	60.5
14	11	www.kcbia.com	58.5	77,281	0.757	60.5
15	13	www.mainstreetlondon.ca	57.5	336,539	0.171	55.5
16	17	Lloydminster www.streetscapes.ca	37.0	20,988	1.763	45.0
17	16	www.downtownhamilton.com	42.0	490,268	0.086	36.0

Unadjusted Rank		
1	**www.downtowncalgary.com**	**81.0**
2	**www.downtownvancouver.net**	**78.5**
3	**www.reginadowntown.ca**	**76.0**
4	**www.downtownwinnipegbiz.com**	**75.0**
5	**www.nanaimodowntown.com**	**73.5**
6	www.downtownkelowna.com	73.0
7	www.downtownoshawa.ca	72.0
8	www.downtownvernon.org	69.5
9	www.downtownsaskatoon.com	68.5
10	www.downtownpg.com	64.5
11	www.kcbia.com	58.5
12	www.duncandowntown.com	57.5
13	www.mainstreetlondon.ca	57.5
14	www.experiencereddeer.com	57.0
15	www.downtownbrandon.com	53.5
16	www.downtownhamilton.com	42.0
17	Lloydminster www.streetscapes.ca	37.0

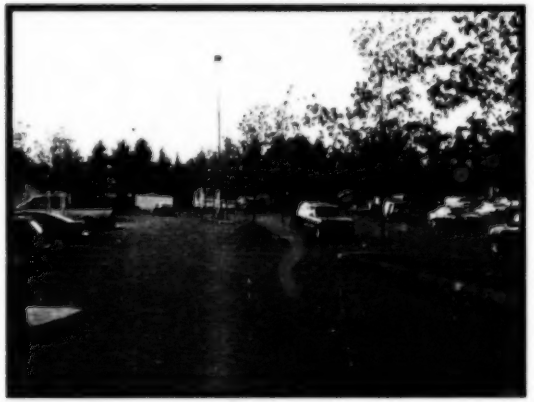
Appendix E
Power Centres
(Box Retail Done Right)

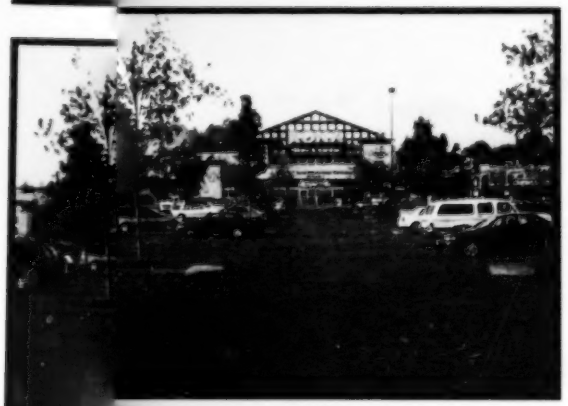
Power Centres Done Right

North Shore Power Centre (North Vancouver)

Power Centres Done Right

Rona (Grandview Highway, Vancouver)





Power Centres Done Right

Rona (Grandview Highway, Vancouver)